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# foreign agriculture circular

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## horticultural products

Approved by the World Agricultural Outlook Board • USDA

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### HORTICULTURAL PRODUCTS REVIEW

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### EXPORT SUMMARY

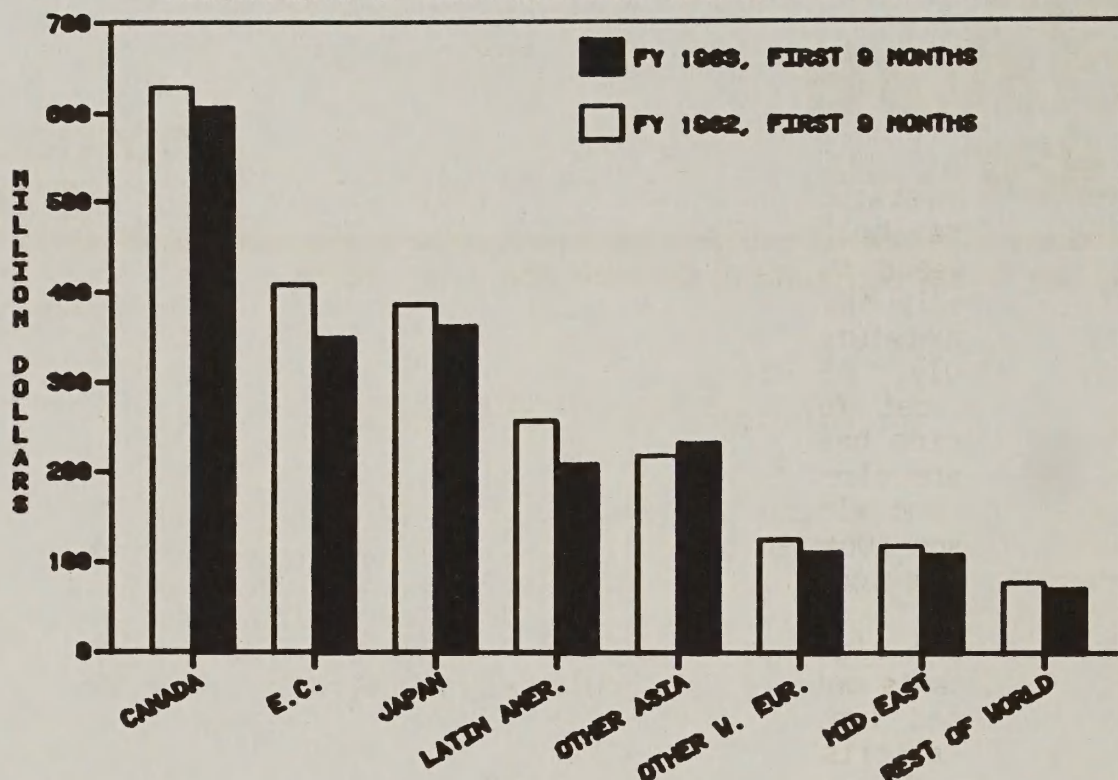
Horticultural exports during the first three-quarters of fiscal year (FY) 1983 (October 1982-June 1983) were \$2.05 billion, \$171 million less than the same period in FY 1982. With the exception of April, monthly export value has persistently fallen below levels recorded last year, declines ranging from three to 20 percent. Export earnings from nearly all horticultural products have fallen this year, with all but a handful of overseas markets importing less. This is clearly shown in the graph and table on the following page.

U.S. exports of horticultural products remain weak under the weight of a depressed world economy which is trying to emulate the recovery underway in the United States, but at a pace far slower than anticipated several months earlier. Despite lower unit prices for many fruit and vegetable categories compared to last year, the persistent strength of the dollar has meant significantly higher local-currency prices at a time of contracted consumer incomes in key export markets in Western Europe and the Far East. This situation has been further exacerbated by the increasingly competitive nature of world markets as a result of a near universal trade emphasis on expanding agricultural exports while simultaneously attempting to hold imports to the barest minimum. The governments of many countries, particularly in Latin America, have mandated sharp restrictions on "non-essential" import items of which almost all horticultural products are classified, thus virtually closing the door on U.S. exports.

For further information on items in this circular, contact the Horticultural and Tropical Products Division, (202) 447-6590. All measures in this report, unless noted otherwise, are metric. One kilogram (kg)=2.2046 lbs., 1 metric ton=2,204.62 lbs., 1 liter=0.2642 gallon, and 1 hectare=2.471 acres.

# SUMMARY

## U.S. EXPORTS OF HORTICULTURAL PRODUCTS BY DESTINATION



Export performance during the last quarter does appear, however, to show some promise of improvement. This will likely materialize in meaningful terms during FY 1984 assuming the world economy continues to grow stronger and the dollar's value relative to other key currencies stabilizes or moves in a more favorable direction. Exports during June were highlighted by heavier shipments of all major types of fresh citrus compared to a year ago. Tree nut exports during upcoming months should show some resurgence due to European demand for both almonds and walnuts. Fresh onions and canned corn, two major disappointments this year, may improve markedly thanks to the expectation of heavier sales to Japan. (See page 3 of this circular.)

## U.S. EXPORTS OF HORTICULTURAL PRODUCTS

	Actual			Forecast
	Oct.-June	Oct.-June	Oct.-Sept.	Oct.-Sept.
	1981/82	1982/83	1981/82	1982/83
-----Million Dollars-----				
Fresh/Processed				
Fruit and Juices.....	1,056	1,037	1,397	1,355
Fresh/Processed				
Vegetables.....	535	444	650	550
Misc. Fruit and Vegetable				
Products.....	216	194	270	250
Nuts and Preparations.....	304	268	387	355
Alcoholic Beverages.....	55	53	75	70
Nursery Products.....	59	58	72	70
Total.....	2,225	2,054	2,851	2,650

MARKET ACCESS AND OPPORTUNITIES

--Cold weather in Japan may lead to more imports of onions and sweet corn. Below normal temperatures in the major producing area of Hokkaido during June and the first half of July may result in smaller onion and sweet corn crops and increased U.S. sales opportunities. The growth of onions in Hokkaido reportedly has been delayed by a week to ten days because of the lowest June temperatures on record, and below-normal temperatures in the first half of July. Although hot summer weather is still expected, it may be too late to get full recovery of the crop. Since the size of the Hokkaido onion crop has been the primary factor determining import levels, some importers are already anticipating relatively high import requirements during the fall and winter. Japan's imports from the United States during the 1982-83 season (October 1-March 31) dropped to 2,142 metric tons from 86,841 tons the previous season.

Hokkaido is also a significant sweet corn producing area, supplying roughly one-third of Japan's output. If the crop does not recover from the adverse weather, increased imports of frozen and canned sweet corn are possible. Although canned exports to Japan are down more than 40 percent this year, Japan remains the largest U.S. export market for these items.

--On July 26, 1983 the Peruvian government announced the purchase of 9,000 tons of fresh potatoes from a cooperative in France. The purchase price was \$219 per metric ton c.i.f. U.S. offer prices were reported to be substantially above this price. Export credit guarantees extended by FAS were an insufficient incentive to bridge the price differential. Peru's potato import needs for this crop year are estimated at 60,000 to 150,000 tons. Peru's only other purchase so far this year was 5,000 tons of Dutch potatoes which reportedly arrived in damaged condition.

--U.S. exporters are advised to be extremely careful in labeling their products for export to Bahrain. Both production and expiration dates should appear, with no indication of alteration. Exporters should print the dates fully or use a three letter abbreviation for the month. There has been some confusion over production and expiration dates being presented only in numerals using the month/day/year sequence while the common practice in this area is to use the day/month/year sequence.

All shipments of frozen goods which bear statements similar to "Keep Chilled" or "Keep Refrigerated" will be rejected. Local officials fear that chilled items nearing the end of their permitted shelf life would be frozen and new production and expiration dates placed on the packets.

--Technical barriers to imports of U.S. wines into the European Community have been greatly simplified or removed through an agreement reached by the United States and the EC Commission. The agreement, signed July 26 after nine years of negotiations, spells out understandings on a long list of technical regulatory requirements which, if strictly enforced, would have barred most American wines from the EC. These requirements covered such areas as enological practices, certification, and geographic designations. In 1982, U.S. wine exports to the EC totaled almost \$12 million.

--The Saudi Arabian Standards Organization has revised the proposed mandatory expiration dates (shelf lives) for frozen and canned fruits and vegetables marketed in Saudi Arabia. This follows comments on the original proposal from the United States and other countries (Horticultural Products Review, April 1983). The revised, proposed dates are as follows: packaged fruit juices--9 months for cans, 12 months for bottles from the date of production, stored at room temperature; frozen concentrated fruit juices--24 months from freezing, with a storage temperature not exceeding  $-18^{\circ}\text{C}$ ; other frozen fruit juices--18 months from freezing ( $-18^{\circ}\text{C}$ ); frozen vegetables--18 months from freezing ( $-18^{\circ}\text{C}$ ); and frozen fruits--12 months from freezing ( $-18^{\circ}\text{C}$ ).

--Sales of health foods are booming in Japan, increasing by 20 to 30 percent a year, according to recent press reports in that country. Emphasis is currently on foods that provide long-term, well-balanced nutrition. Among the products of special interest are honey and prunes. During the first nine months of fiscal 1983 (October 1982-June 1983), U.S. exports of prunes to Japan were 8,482 tons, up 74 percent over the previous year.

Against this backdrop of sharply rising sales, the Japanese government plans to investigate health food marketing methods and product safety. The Ministry of Health and Welfare plans to collect at random about 20 types of imported health foods on sale at retail stores in five selected locations. The products will be chemically analyzed to determine their hygienic qualities.

--Fresh U.S. produce has virtually disappeared from retail shelves in Indonesia as a result of import restrictions enacted in December 1982 (Horticultural Products Review, February and May 1983). U.S. products have been replaced with poor quality, locally produced fruits and vegetables, according to a recent report from the U.S. agricultural counselor in Jakarta. Imports of canned foods have also been curtailed but pipeline supplies have been sufficient to satisfy needs to date. All retail outlets, however, are concerned over the supply outlook in the coming months. Locally produced, canned and otherwise processed foods are plentiful but quality is poor and prices high.

Only two firms are authorized by the Indonesian government to import fresh fruit and other "non-essential goods" such as dried and canned fruit, juices, and wine. All private importers must import the restricted products through these two authorized firms and pay a 5-percent commission. The two firms reportedly do not have extensive experience in importing food products.

Indonesian traders estimate that the current restrictive trade policy on food imports will continue for the balance of 1983 but may ease somewhat early in 1984. Prior to the imposition of the restrictions, Indonesia was an \$11 million market for U.S. horticultural products, primarily fresh apples, grapes, and oranges. During January-June 1983, U.S. horticultural product exports to Indonesia were \$4.0 million, down 46 percent from last year.

MARKET PROMOTION ACTIVITIES

--Two promotional events featuring horticultural products were recently held in West Germany. For the first time, a U.S. pavilion was organized at Kieler Woche (Kiel Week) with support from the U.S. agricultural trade officer (ATO) in Hamburg. Products offered at the stand included U.S. wine, dried fruits, and mixed nuts. The ATO also supported a menu promotion during June by the Seidenweberhaus restaurant in Krefeld. Among the U.S. foods featured were steaks, wines, canned fruits, and vegetables. A special menu was printed for the event.

--FAS sponsored a wine tasting in Cologne, West Germany, during April. The tasting promoted California wines to influential buyers and consumers. Twelve different wines were offered to 80 invited guests representing restaurants, department stores, specialty shops, and hotels in the Dusseldorf/Cologne/Bonn area. There also was an opportunity to view a film on the California wine industry produced by a Hamburg firm. Importers were pleased with the interest in their wines and eager to participate in future events.

--The number of U.S. fast food and restaurant franchises in Asia continues to expand. Singapore now has 17 such franchises, with the Denny's chain being the latest entrant. The U.S. agricultural trade officer in Singapore has been actively involved in introducing U.S. fast food and restaurant chains to interested franchisees, since much of the food products they use is imported from the United States.

--A major American wine exhibition, sponsored by FAS, will be held in Japan in November 1983. The exhibition will run November 9-10 at the Osaka Kokusai International Hotel and November 14-15 at the Akasaku Tokyu Hotel in Tokyo. Osaka and Tokyo are the two largest marketing areas for imported bottled wine in Japan, accounting for one-third of Japan's total annual wine consumption of 70 million liters. This consumption is expected to expand by about 15 percent annually over the next few years.

A maximum of 50 exhibitors can be accommodated in each of the two exhibition sites. Each exhibitor must participate in both shows and will be required to have a representative in attendance during each show and for set-up and dismantling of the display area. A three-by-six foot table and a standard sign showing the name of each exhibitor will be furnished by FAS.

Invitations to the exhibitions will be extended to hotels, restaurants, clubs, caterers, wholesalers, retailers, importers, journalists, VIP consumers, and opinion leaders. U.S. firms interested in participating and exhibiting their wines should contact the U.S. Agricultural Counselor, American Embassy, APO San Francisco 96503, as soon as possible and not later than September 15, 1983.

## MARKET PROMOTION

Shipments of wine samples must arrive in Japan no later than 15 days before the exhibition opens. Shipments can be consigned to:

For Osaka  
Hyoki Kaiun K.K.  
50, Sakaemachi-Dori 2-Chome  
Ikuta-Ku, Kobe  
Attn.: Mr. T. Osaka

For Tokyo  
Nikon Kairiku Unyu K.K.  
5-9, Konan 5-Chome  
Minatu-Ku, Tokyo  
Attn.: Mr. T. Usui

The Nikon Kairiku's correspondent in the United States for handling the shipment is:

Alltransport, Inc.  
World Trade Center  
333 South Flower Street  
Los Angeles, California 90071  
Tel: (213)628-3207/8  
Attn.: Mr. Rene Debrunner

In addition to the description and prices of the wines, each invoice must include the name and amount in parts per million of each additive in the wine, and the alcoholic content and volume of contents in milliliters.

Additives presently allowed in Japan for use in grape wines are as follows: oxidation preventive agents (up to 350 ppm as residual sulfur dioxide)--sodium bisulfite, sodium bisulfite solution, sodium sulfite (crystal and anhydrous), sodium hyposulfite, potassium metabisulfite, and sulfur dioxide; preservative agents (up to 200 ppm as sorbic acid)--sorbic acid and potassium sorbate.

Wines imported for the exhibition will not be assessed import duties providing only reasonable amounts are shipped. Invoices must declare that the wines are samples with no commercial value.

COMMODITY UPDATE

--The European Community has announced measures for the disposal of raisins and dried figs from the 1981 harvest held by storage agencies. EC Council Regulation No. 1603/83 of June 14, 1983, provides for 50,000 tons of Greek raisins still in stock to be sold to distillation industries which will use them in the manufacture of pickles, sauces, mixed condiments or seasonings and by other industries for purposes other than human consumption. The conditions governing sales to distillation industries will be such that they avoid disturbing the Community market in alcohol or alcoholic beverages.

--The 1983 Conference of Sultana Exporting Countries was held July 13-15, 1983 in Bournemouth, England. Five countries sent delegations: Australia, Greece, Iran, South Africa and Turkey. The United States was represented by an observer from the U.S. Embassy in London.

According to the conference chairman, demand prospects for marketing year 1983/84 (September 1-August 31) should be slightly better because of improved world economic conditions. However, he noted that increased area, improved cultural techniques, and a reduction in the use of raisin-type grapes by the wine industry would exacerbate developments in an already oversupplied market. According to data prepared by conference participants, production in the world's six major producing countries will total 729,000 tons in 1983/84. If local consumption and exports take only 222,000 and 406,500 tons, respectively, stocks will grow from 65,000 to 166,000 tons, according to calculations made by conference participants.<sup>1/</sup>

Most contentious among the topics discussed was the EC's minimum import price (MIP). It has wrought substantial changes in world-wide marketing patterns for raisins. Importers have been reluctant to enter into longer term contracts because currency fluctuations have lowered the delivery price below the MIP subjecting them to fines and other administrative problems. Some exporting countries complained that higher prices in the EC may lead to decreased consumption in a time of oversupply, thus affecting the normal market clearing process. Other exporters were concerned because the MIP is regarded as a maximum price, keeping grower incomes in exporting countries at unsatisfactory levels.

A suggested, new generic promotion campaign received strong support from some delegations, although others noted the failure of past efforts. Financing for such a campaign might be determined on the basis of the average share of the market held by individual exporters over the past five years. The form of market promotion activities would be determined after a review of the West European markets in order to identify the country or countries where the money could be best spent. The 1984 conference is scheduled for August 1-3 in Stratford-on-Avon in the United Kingdom.

--France will subsidize its brandy producers to the tune of \$10.3 million to offset income losses resulting from a recently enacted levy on beverages with an alcoholic content exceeding 25 percent. Over 50 percent of the subsidy will go to cognac producers. The balance will be shared by other fruit brandy producers.

<sup>1/</sup> Production and utilization data are not USDA estimates.

## COMMODITY UPDATE

--A preliminary determination that fall harvested, round, white potatoes from Canada are being, or are likely to be, sold in the United States at less than fair value has been made by the Department of Commerce. A final determination will be made by October 14. After that date, the U.S. International Trade Commission (ITC) must determine if Canadian imports are injuring or threaten to injure U.S. potato growers. In the meantime, importers of round, white potatoes from Canada must post a cash deposit or bond equal to 17.9 percent of their f.o.b. value. During January-May 1983, round whites accounted for 60 percent of U.S. potato imports from Canada.

--Imports of frozen concentrated orange juice (FCOJ) from Brazil do pose an economic threat to the U.S. industry according to a July 14 determination of the ITC. The ITC vote consisted of one for and one against injury, with a third Commissioner not participating in the decision. The ITC's ruling is always affirmative in a split vote. The decision means that the Brazilian export tax applicable on shipments to the United States, equivalent to 3.51 percent of the f.o.b. value, port of exit Brazil (roughly \$38.50 per ton of 65° brix), will remain in force. This charge is in addition to the current one percent export tax levied on FCOJ shipments to all destinations. Brazil is reportedly considering an appeal of the ITC ruling since one of the two voting commissioners supported the Brazilian position in the case. (See Horticultural Products Review, July 1983, page 16.)

--A shipment of almost 300 tons of Chilean lemons arrived in New York in mid-July, the first time Chile has shipped a significant lemon volume to the United States and reflecting efforts to diversify export markets from traditional outlets in Western Europe. Lemon shipments to the United States are scheduled to run through early September, with total tonnage expected to range between 1,500 and 2,000 tons. Chilean lemon exports to all destinations during 1982 were slightly less than 3,000 tons but are expected to exceed 5,000 tons this year largely due to a heavier crop outturn.

Chile is concerned about greater competition from Spain in Western Europe and is looking closely at the United States and Canada. Recent trade reports indicate that export availability in Spain is beginning to tighten as a result of the freeze this past February. Spanish exports in August and possibly September could be off sharply from year-earlier levels. This should help spur both Chilean and U.S. lemon exports.

--Martinique has launched a lime promotional campaign in France in order to spur exports. Market development activities are directed toward enhancing consumer awareness of limes and are funded by a 1983 budget of more than \$200,000. At present, sales efforts are of a generic nature with the possibility of Martinique promoting its own commercial brand in the future.

A subsidy of \$770 per hectare is granted to Martinique growers by the European Community which has spurred planting activity in the last five years. Currently, more than 90 percent of Martinique's lime outturn is absorbed by its processing industry. The limes Martinique is promoting in France are a seedless variety weighing 70 to 120 grams (2.5 to 4.2 ounces) with a minimum juice content of 50 percent.

Martinique hopes to export 1,200 tons of limes to France in 1983 with shipments running June-December. Total French lime imports normally do not exceed 2,000 tons annually. Most imports are supplied by Haiti, Brazil, Martinique and the United States. U.S. fresh lime exports to France during 1982 totaled only 74 tons, down sharply from a year earlier. Nevertheless, France still represented the fifth largest export market for U.S. limes. The promotional campaign may help to raise the relatively low per-capita consumption of fresh limes in France. U.S. exports could benefit from this increased consumer demand.

--Approximately 17 tons of Australian oranges are expected to arrive in Japan during the first week of September. A second container is scheduled for mid-month. These represent the first commercial shipments of Australian fruit since Japan lifted its ban on Australian oranges in June 1982. Japanese importers have been reluctant to contract for Australian oranges to date because of the general belief that U.S. oranges are more competitively priced and, therefore, offer a more advantageous utilization of their quota allocations. Virtually all of Japan's orange imports are supplied by the United States, with Japan ranking as the number three export outlet for U.S. oranges. (See Horticultural Products Review, July 1983, page 9.)

--Venezuela prohibited imports of a number of agricultural products including fresh apples, pears, citrus, nuts, onions, corn on the cob, and tomato paste on March 25, 1983. In April and May of 1982, U.S. exports of horticultural products to Venezuela totaled \$7 million. During the same two months of 1983, following the imposition of the new restrictions, U.S. exports were less than \$1 million.

--Canadian apple growers in Quebec, Eastern Ontario, New Brunswick, and Nova Scotia will benefit from a federal compensation and re-establishment program to rectify damages suffered during the severe freezes of the winter of 1980/81. Under the compensation part of the program a federal payment of C\$40 (\$32.41) per standard tree will be made by December 31, 1984, for removal of dead trees and re-plant soil preparation. For replacement trees, the re-establishment program will pay C\$16 (\$12.96) per standard tree to cover the costs of cultivation over three years. Rates for dwarf and semi-dwarf trees will be less than for standard trees. Total outlays under the program could exceed C\$25 million (\$20.3 million).

--The Canadian government recently announced a C\$15 million (\$12.2 million) 3-year extension of the Fruit and Vegetable Storage Construction Financial Assistance Program. This program was created in 1973 and has provided C\$19.4 million in financial assistance to 160 producer groups for the construction of storage facilities for fresh fruits and vegetables. The federal government pays one-third of the costs for the construction of these facilities up to a maximum of C\$500,000 (\$405,000).

The availability of modern storage facilities has led to a lengthening of the marketing season for these commodities and has enabled quality to be maintained for longer periods of time. Eighty percent of the program assistance has been utilized for increased storage of apples and pears and, to a lesser extent potatoes, while the balance has been used primarily for storage of carrots, onions, rutabagas, parsnips, and cabbage.

WORLD FRESH CITRUS TRADE--A LONG TERM VIEWSummary

World exports of fresh citrus from major producing countries have doubled over the past 20 years reaching a record 6,694,000 tons in 1979/80. 1/ Most of the expansion occurred during the 1960's, however, when the average rate of growth was more than twice that in the 1970's. Export markets for sweet oranges, which comprise the bulk of fresh citrus exports, were relatively static during the latter decade despite a 45-percent increase in world production.

The slowdown in orange exports, coupled with steady growth in other citrus markets, has led to a change in the composition of world citrus trade over the two-decade period. In the early 1960's, oranges accounted for about 74 percent of trade, but by the late 1970's oranges were equal to less than 60 percent. In the meantime, the tangerine 2/ share of trade swelled from 7 to 15 percent and that of grapefruit from 5 percent to 12 percent. Lemons accounted for a more or less constant 14 percent of trade throughout the two decades.

The countries adjacent to the Mediterranean Sea are the most important suppliers of fresh citrus exports, but their dominance has diminished as exports from the United States and the Southern Hemisphere have grown. In the early 1980's, the Mediterranean Basin supplied about 70 percent of world fresh citrus exports--down from 80 percent a decade earlier--while the United States supplied 14 percent and the Southern Hemisphere, 11 percent. The Mediterranean area diverts a relatively large proportion of its production (80 percent) to the fresh market in contrast to the two largest citrus producers, the United States and Brazil, which process more than 60 percent of their crops.

Citrus export trends have been determined in large part by shifts in worldwide demand for fresh citrus. Western Europe, supplied primarily by the Mediterranean area, remained the dominant market throughout the period, but its portion of world imports declined from about 82 percent in the early 1960's to 63 percent in the late 1970's. During the two decades, the Soviet Union and its East European neighbors increased their share of world imports from 8 percent to 19 percent. Other fast-growing markets were in the Far East where the principal importers--Japan, Hong Kong and Singapore--pushed up their share of world citrus imports from 5 to 8 percent.

In general, these trends in the composition of world citrus trade and in the relative importance of marketing areas should continue throughout the next decade. However, an expected slowdown in the rate of expansion of world fresh citrus trade in the 1980's compared to the past two decades will result in less dramatic shifts.

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1/ Does not include minor citrus categories such as limes, sour oranges and citrons. 2/ Tangerine and mandarin varieties including satsuma, clementine and tangelo.

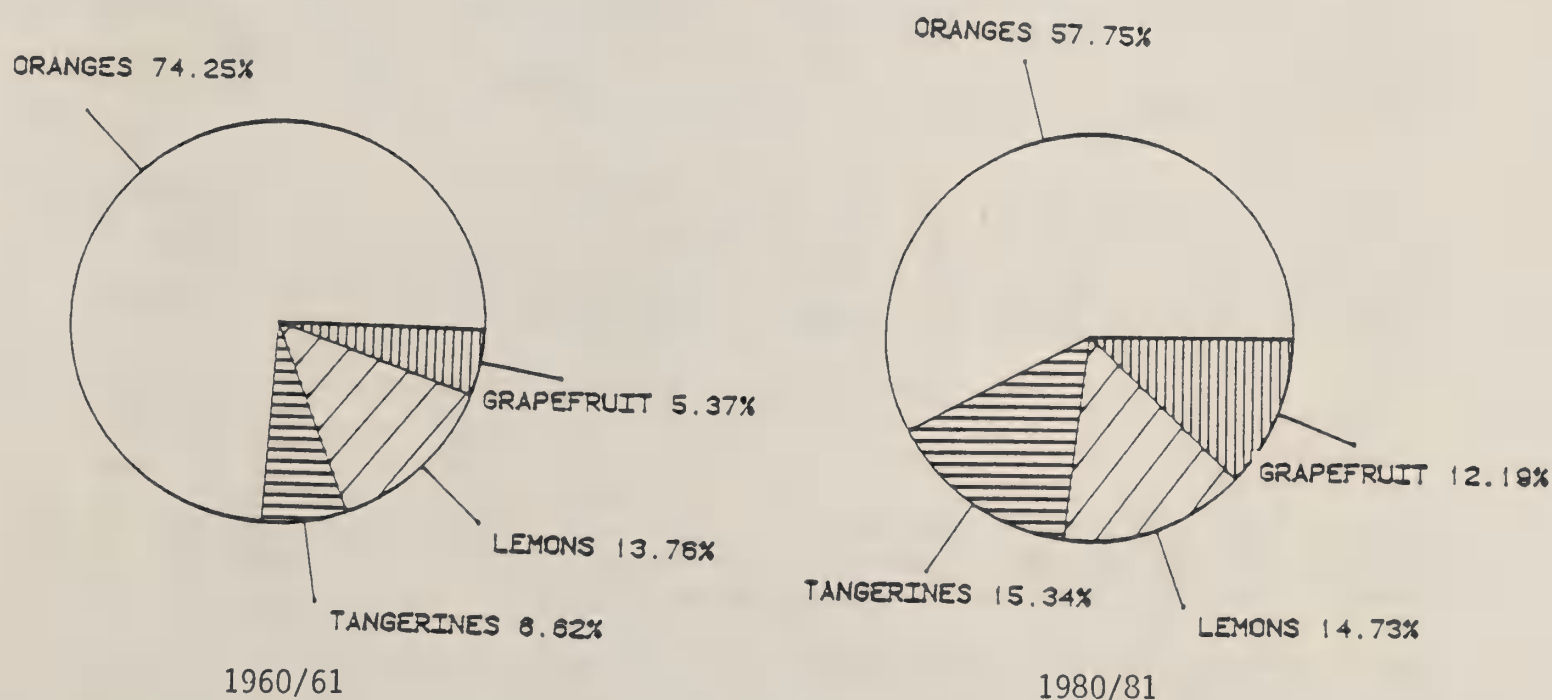
By 1990 the orange share of total citrus trade will have fallen another 2 percent with tangerines and grapefruit making small gains. Both the Middle East and the Far East will figure more importantly as orange, tangerine and lemon markets while Eastern Europe and the Soviet Union will figure more importantly as grapefruit markets.

### Trends in World Exports

World exports of oranges and tangerines grew from about 2.8 million tons in the early 1960's to 4.8 million tons in the early 1980's. Orange exports, which grew at an average rate of 110,000 tons annually in the 1960's, remained relatively stagnant throughout the 1970's, coincident with a slowdown in world orange production.

Tangerines exhibited strong export growth throughout both decades increasing by 30,000 tons per year in the 1960's and by 40,000 tons annually in the 1970's. The continued expansion of tangerine exports in the latter decade helped enhance their importance in relation to oranges. In the early 1960's, tangerines comprised 8 percent of the orange-tangerine trade compared to 21 percent in the early 1980's.

### COMPOSITION OF FRESH CITRUS FRUIT EXPORTS



## CITRUS

The Mediterranean Basin, which exports one-third of its orange production, currently supplies 70 percent of world trade in sweet oranges. Spain, Morocco, Israel and Greece are the primary exporters with Spain alone contributing 23 percent of world orange exports. Countries whose orange industries are devoted primarily to export markets are Cyprus, Gaza, Greece, Lebanon, Morocco, Cuba and South Africa.

The United States supplies between 8 and 11 percent of world orange trade. Fresh orange exports, however, represent less than 5 percent of domestic production. Asia, the fastest growing regional market, took 49 percent of U.S. exports in 1981/82 and Canada, 37 percent.

The Mediterranean Basin's dominance in fresh citrus trade is most evident in the tangerine export market of which it supplies 90 percent or more. Spain provides 63 percent of total tangerine exports followed by Morocco with 18 percent and Turkey with 6 percent. Cyprus, Lebanon, Morocco and Spain export more than 50 percent of their annual production. While the level of tangerine exports originating in Japan, Mexico and the United States more than doubled during the 1960's, virtually all growth in tangerine exports in the 1970's was in Spain, Morocco, Turkey and Lebanon.

World trade in grapefruit expanded steadily throughout the past two decades, quadrupling from less than 200,000 tons per year to almost 800,000 tons. With 20 percent of total commercial production entering the international market, grapefruit now account for about 12 percent of world fresh citrus trade. Production and export trends in the 1970's indicate continued growth in fresh grapefruit trade during the 1980's.

The United States currently supplies 35 to 40 percent of world grapefruit exports and Israel from 25 to 35 percent. These two countries, plus Cyprus, Cuba and South Africa (including Swaziland), shipped 90 percent of world grapefruit exports in 1981/82.

World lemon exports have also increased steadily over the past 20 years, more than doubling from 459,000 tons in 1960/61 to 1 million tons in 1981/82. Approximately 30 percent of world lemon production is exported. Spain, Italy, Greece, Turkey and the United States are currently the major shippers, supplying 83 percent of total world exports in 1981/82.

Italy's exports have been stagnant since the early 1960's, but Spanish lemon shipments grew from 34,000 tons in 1960/61 to 330,000 tons in 1981/82. Spain accounted for nearly half of the increase in world lemon exports since the early 1960's. Further growth in Spanish exports should occur during the 1980's. Turkey's exports grew ten-fold from only 12,000 tons in 1960/61 to 120,000 tons in 1980/81. Greek exports doubled from an average of 31,000 tons in the early 1960's to an average of 70,000 tons in recent years.

Southern Hemisphere shippers, mainly South Africa, Argentina and Uruguay, increased their share of world lemon exports from 2 to 8 percent during the 1960/61 - 80/81 period. While lemon exports from the Mediterranean and Southern Hemisphere areas grew during the 1970's, U.S. exports remained stagnant. The United States has usually provided around 20 percent of world lemon trade during the two decades, although that share has declined in recent years.

### Trends in World Imports

West European countries now absorb about two-thirds of world trade in fresh oranges and tangerines. Between 1977 and 1981, per capita availability of these fruits in the European Community <sup>1/</sup> and other West European countries <sup>2/</sup> averaged 12.7 and 14.4 kilograms, respectively, compared to 8.8 kilograms in the United States.

Total orange and tangerine imports into Western Europe have grown slowly over the past two decades. While tangerine imports grew by about 34,000 tons annually, orange imports, particularly after 1970, exhibited a slight decline. Tangerines now account for over 25 percent of combined orange and tangerine consumption in West European countries versus 8 percent in 1960 and 15 percent in 1970.

In recent years, West European countries have imported approximately 80 percent of world tangerine exports with Spain and Morocco supplying 90 percent of these imports. Spain, Israel and Morocco supply over 70 percent of EC orange imports while Israel is the chief supplier of the Scandinavian countries.

U.S. participation in EC orange trade is limited by the proximity of Mediterranean producers and by preferential EC tariffs for Mediterranean countries. Duties assessed Mediterranean countries are 40 to 80 percent lower than other suppliers. Between 1978 and 1981, the United States supplied less than 2 percent of EC orange imports.

West European dominance of the orange and tangerine import market has declined due to increased demand in other major importing regions. Imports into the Soviet Union and Eastern Europe, having risen more than five-fold since 1960, accounted for the greatest 20-year volume increase. Annual per capita availability in these countries is still less than 5 kilograms. Cuba, Morocco, Greece and Egypt are the major orange suppliers to the East European countries, while most tangerines originate in Morocco and China.

Imports into Canada, the United States' chief single-country export market, increased by about 50 percent over the past two decades. Tangerines now account for more than 15 percent of combined imports.<sup>3/</sup> The United States supplied 87 percent of Canadian imports between 1978-81 with Japan, South Africa and Morocco supplying most of the remainder.

<sup>1/</sup> EC importing countries include Belgium, Denmark, France, Ireland, Luxembourg, the Netherlands, the United Kingdom and West Germany. Italy is included in the case of grapefruit only. Net imports to the EC include imports from all non-EC countries plus imports from Greece and Italy.

<sup>2/</sup> Austria, Finland, Norway, Sweden and Switzerland. <sup>3/</sup> Estimate is based upon an analysis of orange and tangerine import origins. Unloads data indicate tangerine share may be over 20 percent.

## CITRUS

The volume of U.S. tangerine and orange exports to the Far East surpassed that to Canada for the first time in 1980. Per capita availability of fresh oranges and tangerines in Japan, Hong Kong and Singapore, the region's largest markets, exceeds that in the United States by three to four times. These three markets account for 7 percent of total world orange imports, with 85 percent of their imports originating in the United States. Growth of the Japanese market has been restrained by a fresh orange import quota which keeps the level of imported fruit at about 3 percent of total orange and tangerine availability in the country. Australian and Israeli fruit compete with U.S. oranges in the Singapore market. Tangerines, which make up only 5 to 6 percent of combined orange and tangerine imports into Hong Kong and Singapore, come mostly from China and Taiwan. Some of the oranges and tangerines imported into Singapore are destined for consumption in neighboring countries.

The fastest growing markets for fresh oranges and tangerines are in the Middle East. Annual imports increased by approximately 5,000 tons per year in the 1960's and by 15,000 tons per year in the 1970's. Neighboring countries, including Lebanon, Egypt and Turkey, are the major Middle East suppliers. South Africa, Morocco and Spain also provide substantial quantities. U.S. orange exports to the region totaled only 4 tons in 1981/82, down from 2,000 tons in 1980/81.

Western Europe accounts for roughly two-thirds of world grapefruit imports. Imports grew by about 18,300 tons annually over the past 20 years. Israel supplies 40 to 45 percent of the region's imports. The United States follows in importance, providing between 15 and 20 percent of imports.

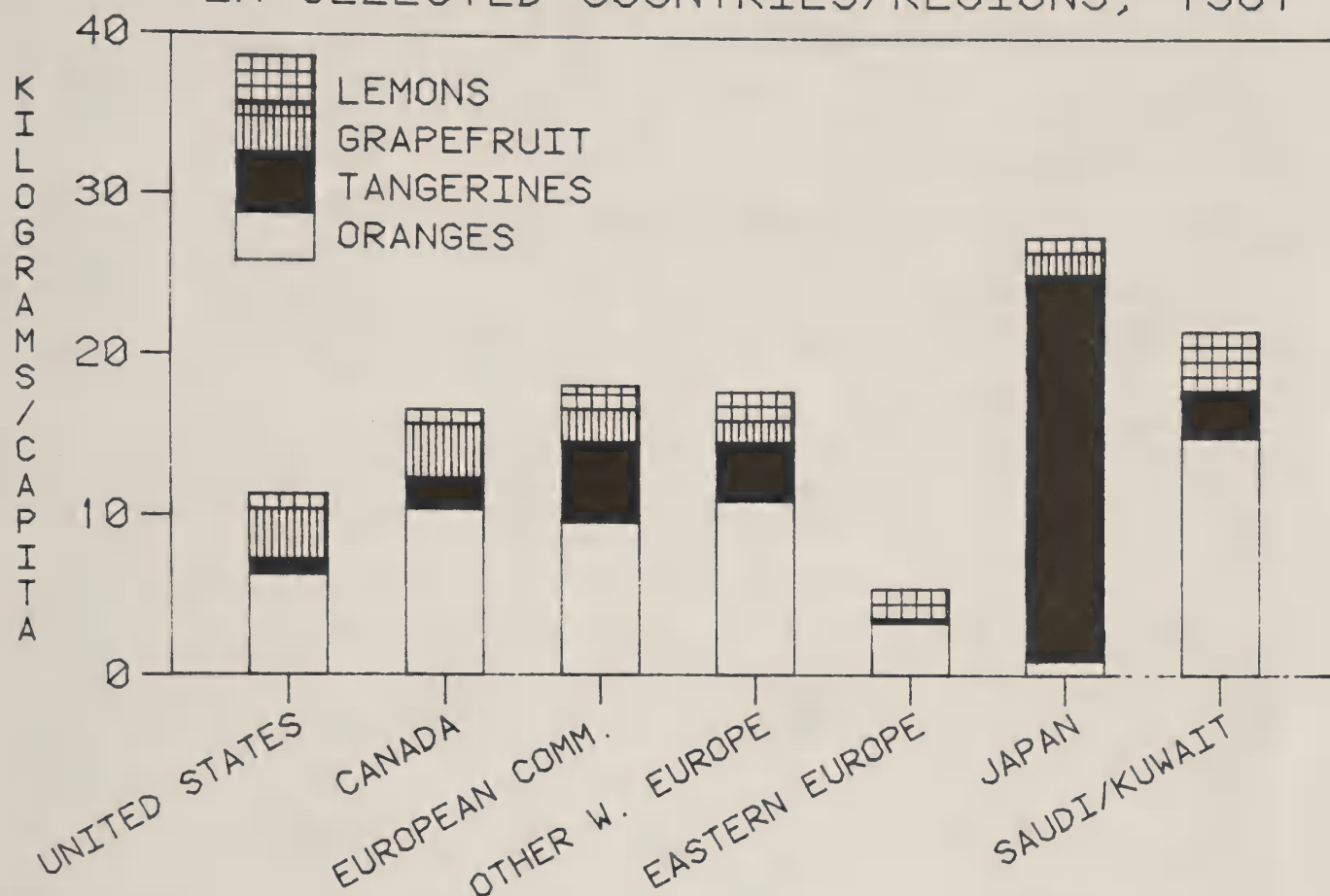
Imports of grapefruit into Canada, with the largest regional per capita demand, have increased slightly over the 20-year period. The Canadian share of world imports, however, dropped from 33 percent in the early 1960's, to 11 percent in recent years. One-sixth of U.S. grapefruit exports are destined for Canada, meeting virtually all of Canadian demand.

Japan has exhibited the most dramatic growth in demand for grapefruit. Per capita availability rose from virtually none in the early 1960's, when imports were limited by quota, to 1.4 kilograms in 1981. Japan, taking 90 percent of its imports from the United States, is now our major market for fresh grapefruit.

Grapefruit consumption in the Soviet Union and Eastern Europe remains low, but has increased in recent years due to increased availability of Cuban grapefruit.

Import demand for lemons is more uniformly distributed than for any other fresh citrus fruit. Total import demand in Japan and the Middle East has grown steadily throughout the two decades as a result of significant growth in availability per capita. Lemon availability in Eastern Europe has doubled over the past 20 years. Lemons now comprise close to 40 percent of per capita availability of fresh citrus in Eastern Europe compared to 10 percent in Western Europe. Close to half of East European imports are relatively low-quality lemons from Italy and Greece.

# PER CAPITA AVAILABILITY OF FRESH CITRUS IN SELECTED COUNTRIES/REGIONS, 1981



## Import Outlook

The percentage growth in world trade of all fresh citrus in the 1980's will be about one-third less than the growth experienced during the 1970's, assuming moderate economic growth and no changes in the relative prices of citrus and citrus substitutes such as fresh deciduous and tropical fruits. Individual country/region projections are based on historical trends in per capita availability where such trends are evident. For the Soviet Union and Singapore, where it was not possible to calculate per capita availability, trends in total imports were estimated. In cases in which per capita availability has been volatile or unusually stable, projections are based on average per capita availability in recent years. Population estimates and projections were obtained from the U.S. Bureau of Census.

The use of trend analysis in projecting import demand is based on the assumption that future levels of the economic factors which determine demand, such as income and price, will follow historic trends. Import projections in this analysis are therefore qualified by the fact that the economic environment in the 1980's may differ substantially from that in the two preceding decades. Further study of how changes in income, citrus prices, prices of citrus substitutes, the availability of processed citrus products and consumer preferences affect the volume of citrus imports would be helpful in gaining additional insights into future citrus import demand.

## CITRUS

The bulk of increased demand will result from growth in population rather than in increased per capita consumption. The greatest rate of population growth--an increase of 30 percent between 1985 and 1995--will occur in the Middle East. Hong Kong follows with up to a 19-percent increase. In Japan, the United States and Canada, total population increases between 1985 and 1995 will range from 6 to 9 percent. Population in West European countries will grow by only 2 percent. The most substantial changes in per capita availability are likely to occur in the Soviet Union and Eastern Europe.

Total world citrus imports grew by about 22 percent in the 1970's. Growth in the 1980's is projected at only 15 to 16 percent.<sup>1/</sup> The biggest percentage increase in imports--almost 30 percent--is expected for grapefruit. Over half of the growth in grapefruit is likely to occur in Western Europe where the pace of import expansion will be about the same as in the 1970's. Another quarter of the increment in grapefruit trade will be in Eastern Europe and the Soviet Union where most of the additional imports will be fruit of Cuban origin. Not considered in the projections is the possibility of developing markets for grapefruit in the Middle East and in East Asian markets which currently import little or none of this fruit.

Orange importing countries in Western Europe and the Middle East are expected to continue their swing toward tangerines, but not at so rapid a rate as in 1970's. World-wide imports of tangerines are expected to grow by about 20 percent during the 1980's compared to more than 80 percent in the previous decade. The biggest growth in orange imports should occur in Eastern Europe, the Soviet Union and in East Asian markets. Growth in East Asia should favor U.S. exporters who have good toe-holds in those markets. Growth in lemon imports will probably be modest in the 1980's. The largest increments should be in Eastern Europe, the USSR and the Middle East.

Demand for fresh citrus in Canada in the 1980's should be stable. Per capita availability of oranges, tangerines and grapefruit has shown little or no growth over the past ten years. Per capita consumption of fresh grapefruit in Canada is currently more than 10 percent higher than in the United States, while fresh orange and tangerine consumption are 55 and 110 percent higher, respectively. A slight increase in per capita lemon availability, in line with past trends, is likely.

Stable per capita consumption and slow population growth will constrain the growth of fresh citrus imports in West European countries during the 1980's. The region's share of total world imports will fall from 62 percent in 1979-81 to 54 percent in 1990.

No growth is foreseen in per capita availability of oranges and tangerines in the region since availability over the past 20 years has been stagnant. Tangerines will grow in importance, probably accounting for close to 30 percent of combined orange and tangerine imports into Western Europe by 1990.

Prospects for growth in lemon exports to Western Europe are also low. Projections for import demand are based on modest growth in per capita availability up to 1990. Expected increases in the availability of Spanish lemons should influence the market.

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<sup>1/</sup> Percentages are based on calculations of changes between annual average imports in 1969-71 and 1979-81, and between 1979-81 and 1990 projections.

Per capita availability of grapefruit in both EC and other West European countries has trended upward over the past 20 years. Assuming a continuation in this trend for non-EC countries, where availability per capita is 30 percent lower than in the EC, and a slowdown in this trend for EC countries, the entire region's grapefruit imports would rise by 121,000 tons between 1979-81 and 1990.

Due to their currently low consumption rates for citrus other than lemons, the Soviet Union and East European countries will probably account for a disproportionately large share of increased fresh citrus imports during the 1980's. Increases in per capita availability may account for up to 25 percent of the increase in total citrus imports. In addition, long-term commitments to buy Cuban citrus may have an effect on future consumption, especially of grapefruit, in these countries.

Projected consumption of grapefruit in these two areas in 1990 is 109,000 tons, up more than double the 1979-81 level. The projection for Eastern Europe is based on the most recent 10-year trend in per capita availability while that for the Soviet Union assumes a moderation of recent rapid growth in imports.

Orange, lemon and tangerine consumption in Eastern Europe appears to have leveled off. The average per capita availability in 1972-81 was used to project future demand. Although an upward trend is evident in total Soviet lemon imports, import growth is expected to slow down in the 1980's and 1990's.

Increased orange exports to Japan are dependent on the easing of quota restrictions. Following the 1978 Tokyo Round of the Multilateral Trade Negotiations, import ceilings on fresh oranges were increased annually between 1979 and 1983. Projections of orange imports are based on the elimination of the quota by 1990. Even the absence of quantitative restrictions, imported oranges would represent less than 6 percent of Japanese fresh citrus fruit consumption.

Scheduled lowering of tariffs in the 1980's figures into the lemon and grapefruit forecasts. In addition, heavy market promotion should continue to affect Japanese consumption of grapefruit.

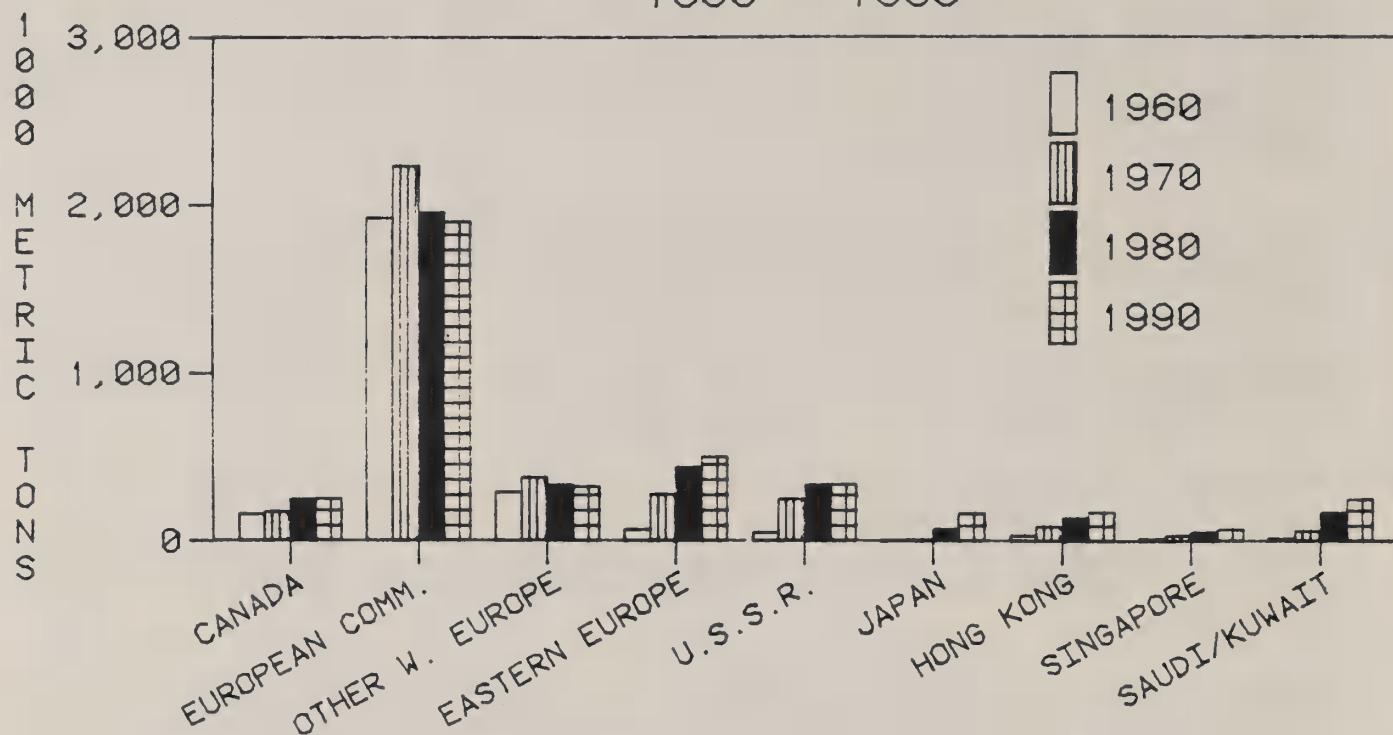
Per capita availability of oranges and tangerines in Hong Kong has leveled off in recent years. Increases in future imports will rely on increases in population. The effect of the 1997 termination of Britain's lease to Hong Kong on future growth in population and income was not taken into account.

Assuming that past import trends prevail throughout the 1980's, Singapore's imports of oranges and tangerines will increase by 29 percent during the current decade. An estimated 11 percent of 1990 imports will be tangerines. A portion of Singapore's imports is ultimately consumed in Malaysia and Indonesia.

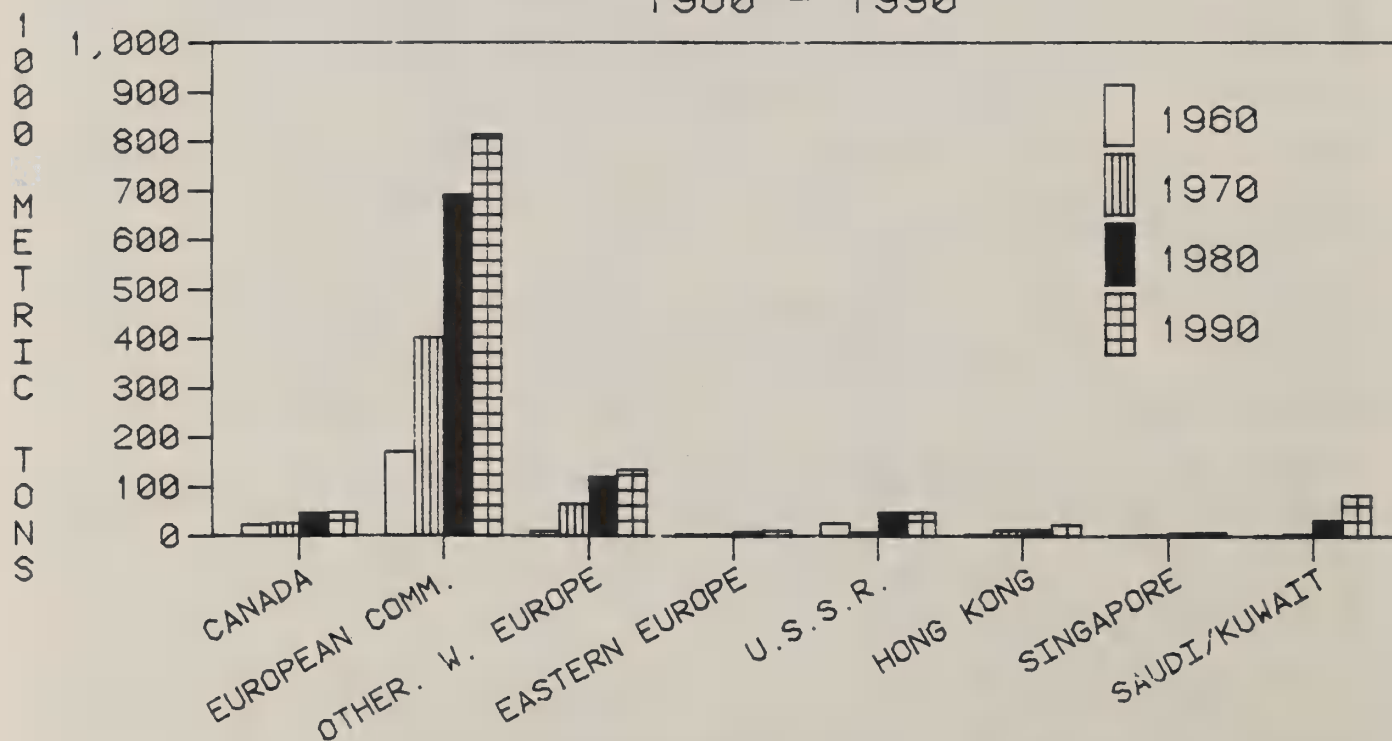
In the Middle East lemon availability will probably remain stable at 3.7 kilograms per capita, while orange and tangerine demand is likely to continue to grow but at a slower rate, after the mid-1980's.

CITRUS

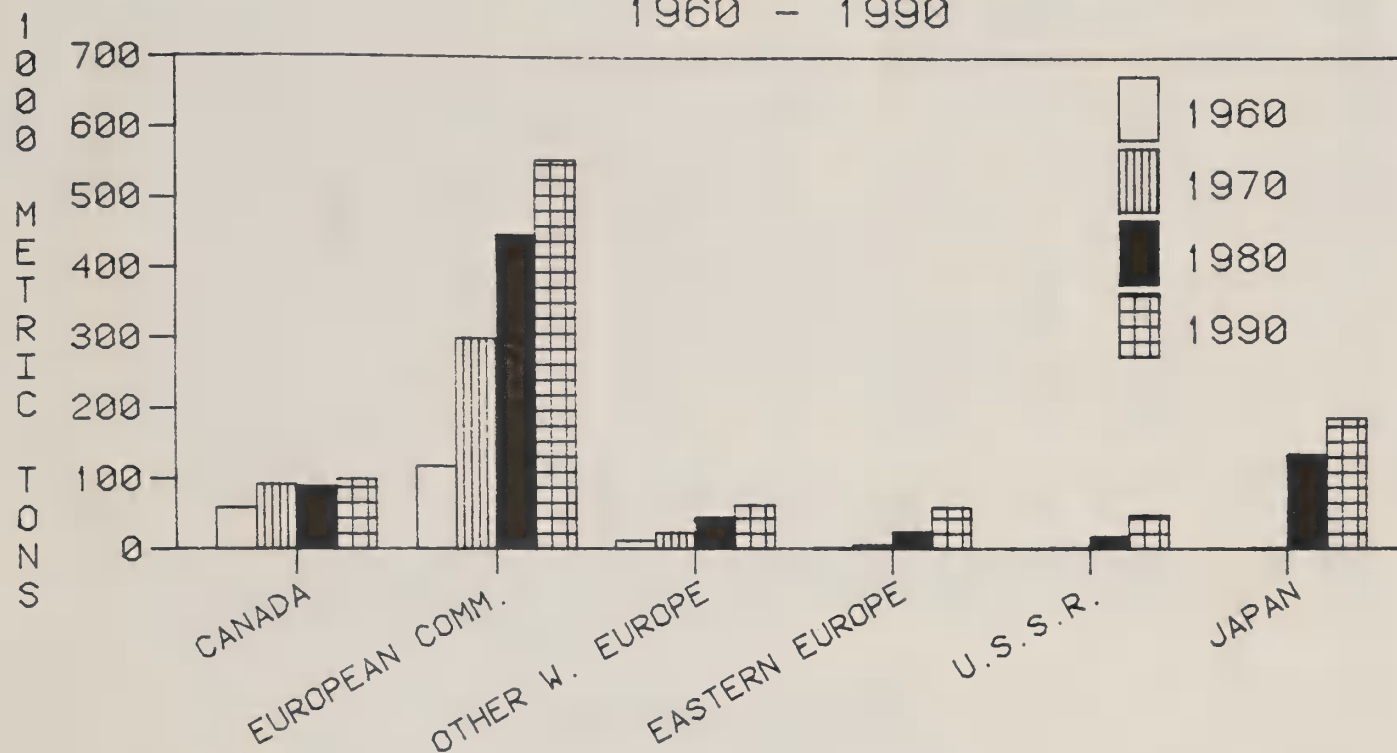
# IMPORTS OF FRESH ORANGES INTO SELECTED COUNTRIES/REGIONS 1960 - 1990



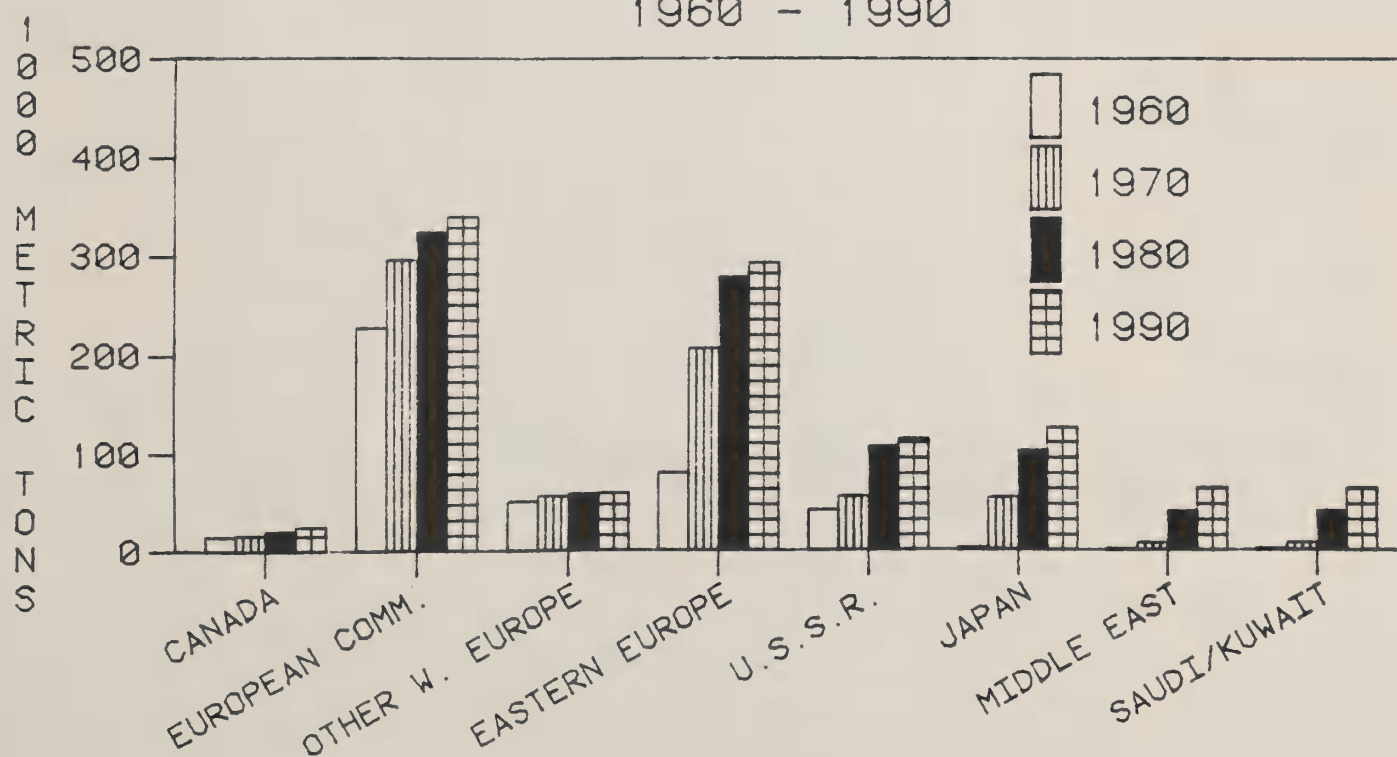
# IMPORTS OF FRESH TANGERINES INTO SELECTED COUNTRIES/REGIONS 1960 - 1990



# IMPORTS OF FRESH GRAPEFRUIT INTO SELECTED COUNTRIES/REGIONS 1960 - 1990



# IMPORTS OF FRESH LEMONS INTO SELECTED COUNTRIES/REGIONS 1960 - 1990



## CITRUS

ORANGES: IMPORTS INTO SELECTED COUNTRIES AND REGIONS  
CALENDAR YEARS 1960-81 AND PROJECTIONS TO 1995 <sup>1/</sup>  
(1,000 Metric Tons)

Year	: United States	: Canada	: Net EC-8 <sup>2/</sup>	: Other Western Europe <sup>3/</sup>	: Eastern Europe <sup>4/</sup>	: USSR	: Japan	: Hong Kong	: Singapore	: Saudi Arabia & Kuwait	: Total
1960....	8	160	1,923	292	69	52	---	34	16	16	2,570
1961....	9	152	1,834	297	78	54	---	33	18	13	2,488
1962....	11	151	2,030	312	87	57	---	38	20	14	2,720
1963....	50	131	1,754	277	74	88	---	40	21	16	2,451
1964....	50	157	2,201	344	115	116	1	48	23	20	3,075
1965....	26	160	2,117	352	161	141	1	54	24	28	3,064
1966....	16	169	2,172	359	251	142	2	58	27	32	3,228
1967....	22	179	1,975	344	260	184	2	66	28	39	3,099
1968....	40	149	1,921	348	263	193	2	59	24	42	3,041
1969....	25	175	2,106	362	274	233	3	68	28	49	3,323
1970....	23	175	2,238	380	279	250	4	87	32	60	3,528
1971....	32	173	2,058	356	340	255	7	91	32	60	3,404
1972....	28	178	2,193	378	416	330	13	104	37	67	3,744
1973....	31	176	2,320	377	442	312	16	120	36	72	3,902
1974....	20	185	2,076	367	462	357	20	104	32	68	3,691
1975....	7	203	2,084	386	426	335	22	129	40	73	3,705
1976....	9	251	2,081	367	443	318	24	122	39	87	3,741
1977....	11	280	2,107	365	455	335	22	126	43	92	3,836
1978....	16	230	1,939	319	448	299	51	128	42	110	3,582
1979....	28	197	1,897	330	449	286	54	106	47	137	3,531
1980....	10	249	1,956	334	439	332	71	137	50	168	3,746
1981....	7	256	1,672	320	363	336	75	134	63	215	3,441
Projections:											
1990....	15	254	1,901	325	502	337	166	175	68	251	3,994
1995....	15	264	1,918	325	545	350	171	189	76	301	4,154

<sup>1/</sup> In 1981 the countries and regions included accounted for about 94 percent of world orange imports. <sup>2/</sup> Total imports less imports from other EC countries except Italy and Greece. <sup>3/</sup> Austria, Finland, Norway, Sweden, Switzerland. <sup>4/</sup> Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania, Yugoslavia.

TANGERINES: IMPORTS INTO SELECTED COUNTRIES AND REGIONS  
CALENDAR YEARS 1960-81 AND PROJECTIONS TO 1995 <sup>1/</sup>  
(1,000 Metric Tons)

Year	: United States	: Canada	: Net EC-8 <sup>2/</sup>	: Other Western Europe <sup>3/</sup>	: Eastern Europe <sup>4/</sup>	: USSR	: Hong Kong	: Singapore	: Saudi Arabia & Kuwait	: Total
1960....	4	23	173	10	3	27	4	2	1	247
1961....	3	22	187	13	3	11	5	3	1	248
1962....	2	17	209	24	3	11	4	3	1	274
1963....	6	13	182	36	7	13	5	3	1	266
1964....	7	20	246	34	5	16	4	3	2	337
1965....	10	19	253	41	4	12	6	3	2	350
1966....	11	19	275	37	3	12	7	4	3	371
1967....	3	22	283	35	2	12	9	4	3	373
1968....	24	25	274	43	3	12	10	3	4	398
1969....	16	26	389	53	3	13	11	4	4	519
1970....	18	26	403	65	3	8	13	4	5	545
1971....	9	27	423	62	4	12	16	4	5	562
1972....	22	31	517	70	5	14	14	5	6	684
1973....	24	34	523	75	6	16	15	5	5	703
1974....	27	27	524	82	6	16	13	4	6	705
1975....	21	33	508	81	7	21	15	6	9	701
1976....	18	61	616	100	7	7	15	5	10	839
1977....	28	61	651	107	7	19	17	6	16	912
1978....	26	31	638	110	8	38	17	6	15	889
1979....	17	45	727	116	8	48	17	6	30	1,014
1980....	15	46	691	119	8	48	13	6	33	979
1981....	17	46	671	113	8	33	18	6	42	954
Projections:										
1990....	16	49	814	135	11	48	23	8	84	1,188
1995....	16	51	822	139	14	50	25	9	100	1,226

<sup>1/</sup> In 1981 the countries and regions included accounted for over 95 percent of world tangerine imports. <sup>2/</sup> Total imports less imports from other EC countries except Italy. <sup>3/</sup> Austria, Finland, Norway, Sweden and Switzerland. <sup>4/</sup> Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania and Yugoslavia.

GRAPEFRUIT: IMPORTS INTO SELECTED COUNTRIES AND REGIONS  
CALENDAR YEARS 1960-81 AND PROJECTIONS TO 1995 <sup>1/</sup>  
(1,000 Metric Tons)

CITRUS

Year	United States	Canada	Net EC-9 <sup>2/</sup>	Other Western Europe <sup>3/</sup>	Eastern Europe <sup>4/</sup>	USSR	Japan	Total
1960....	2	60	119	12	2	---	---	195
1961....	---	73	115	13	2	---	---	203
1962....	---	70	139	14	5	---	---	228
1963....	---	51	138	14	3	---	---	206
1964....	1	55	173	17	6	---	1	253
1965....	---	68	187	18	14	---	1	288
1966....	---	64	207	18	10	---	1	300
1967....	1	82	226	21	7	---	1	338
1968....	2	70	264	20	6	---	1	363
1969....	2	93	262	20	4	---	2	383
1970....	4	92	300	23	6	1	2	428
1971....	4	87	375	24	7	3	11	511
1972....	8	87	356	26	11	1	91	580
1973....	7	89	392	31	14	2	110	645
1974....	6	90	357	30	19	4	151	657
1975....	4	85	393	36	16	2	147	683
1976....	7	96	436	39	24	5	152	759
1977....	8	80	422	39	32	6	161	748
1978....	1	94	463	41	30	10	142	781
1979....	3	82	441	46	40	8	159	779
1980....	4	89	447	45	25	18	135	763
1981....	2	81	469	42	25	28	167	814
Projections:								
1990....	3	100	554	63	60	49	188	1,017
1995....	3	104	582	75	62	54	194	1,074

<sup>1/</sup> In 1981 the countries and regions included accounted for about 96 percent of world grapefruit imports. <sup>2/</sup> Total imports less imports from other EC countries. <sup>3/</sup> Austria, Finland, Norway, Sweden and Switzerland. <sup>4/</sup> Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania and Yugoslavia.

LEMONS: IMPORTS INTO SELECTED COUNTRIES AND REGIONS  
CALENDAR YEARS 1960-81 AND PROJECTIONS TO 1995 <sup>1/</sup>  
(1,000 Metric Tons)

Year	Canada	Net EC-8 <sup>2/</sup>	Other Western Europe <sup>3/</sup>	Eastern Europe <sup>4/</sup>	USSR	Japan	Saudi Arabia & Kuwait	Total
1960....	15	228	50	80	42	3	2	420
1961....	15	244	45	91	36	3	2	436
1962....	15	272	49	113	37	4	1	491
1963....	15	246	47	104	25	4	2	443
1964....	15	291	54	125	53	15	3	556
1965....	15	296	53	160	39	19	4	586
1966....	15	298	57	174	54	23	5	626
1967....	16	294	54	172	56	30	5	627
1968....	15	303	55	177	52	36	6	644
1969....	16	302	58	198	53	41	7	675
1970....	17	297	56	206	56	54	8	694
1971....	16	304	54	228	58	62	8	730
1972....	17	280	52	239	56	79	6	729
1973....	17	297	54	271	49	91	7	786
1974....	17	290	53	268	82	93	10	813
1975....	19	297	56	268	79	64	11	794
1976....	19	326	58	283	88	93	15	882
1977....	19	309	55	276	75	105	33	872
1978....	21	327	58	283	74	117	31	911
1979....	21	318	58	289	64	100	48	898
1980....	21	324	58	278	106	101	40	928
1981....	22	305	57	245	98	113	44	884
Projections:								
1990....	25	340	59	293	114	125	64	1,020
1995....	26	344	59	301	133	129	74	1,066

<sup>1/</sup> In 1981 the countries and regions included accounted for about 95 percent of world lemon imports. <sup>2/</sup> Total imports less imports from other EC countries except Italy and Greece. <sup>3/</sup> Austria, Finland, Norway, Sweden and Switzerland. <sup>4/</sup> Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania and Yugoslavia.

# CANADIAN MARKET FOR FRESH FRUIT AND VEGETABLES, 1982

In 1982 Canada imported \$844 million of fresh fruit and vegetables.<sup>1/</sup> The United States, in value terms, supplied 86 percent of these imports, down 1 percent from the previous year.

The volume of Canadian fresh produce imports from all sources declined in 1982. Fresh vegetable imports fell by 1.3 percent and fresh fruit imports were down by 7.6 percent. The decline was probably due to the squeeze on consumer incomes caused by a 4.8-percent contraction in the Canadian economy in 1982. Canadian imports of U.S. vegetables were down by 8 percent in 1982. Close to one-half of the decline was accounted for by potatoes, with the remainder made up by lettuce, onions, cabbage, tomatoes, green onions and sweet potatoes. Canadian imports of U.S. fresh fruit were down by 5 percent in 1982. Most of the decline was attributable to lower orange and tangerine shipments. Substantial increases in imports of U.S. cantaloupes and grapes were offset by declines in apple, lemon, peach, pear and plum imports.

<sup>1/</sup> Excluding bananas and plantains.

## CANADA: IMPORTS OF FRESH FRUIT AND VEGETABLES, 1980-82

Commodity and Origin	1980	1981	1982	1980	1981	1982
	-- 1,000 metric tons--			--- US\$1 million <sup>1/</sup> ---		
<u>Fruit</u> <sup>2/</sup>						
United States.....	761	822	781	336	356	388
Other.....	104	101	130	42	72	89
Total.....	865	923	911	378	428	477
<u>Vegetables</u>						
United States.....	853	961	884	277	350	341
Other.....	52	46	46	21	33	26
Total.....	905	1,007	930	298	383	367
<u>Fruit and Vegetables</u>						
United States.....	1,614	1,783	1,665	613	706	729
Other.....	156	147	176	63	105	115
Total.....	1,770	1,930	1,841	676	811	844
<u>U.S. Share (Percent)</u>						
Fruit.....	88	89	86	89	83	81
Vegetables.....	94	95	95	93	91	93
Fruit and Vegetables.....	91	92	90	91	87	86

<sup>1/</sup> Converted from Canadian dollars at the following U.S. dollar per Canadian dollar rates: 1980 - \$0.855, 1981 - \$0.84, 1982 - \$0.81. <sup>2/</sup> Excludes bananas and plantains.

SOURCE: Official Trade of Canada.

In 1982 the U.S. share of Canadian imports of onions, apples, lemons, oranges and tangerines declined. In the case of onions, the decline was due to an overall drop in imports coupled with increased imports of Spanish and

Chilean onions. U.S. apples were displaced by French apples. Likewise, U.S. lemons were displaced by Spanish, Chilean and South African lemons. In 1982, Canada's total orange and tangerine imports fell by 27,000 tons, but imports from South Africa, Spain and Brazil were up substantially. Unload statistics for 12 cities indicate that the tangerine share of orange and tangerine imports increased from 17 percent in 1980 to 24 percent in 1982.

Canada's annual unload report for fruit and vegetables provides further insights into the Canadian market. This report, which contains data collected from terminal markets in 12 Canadian cities, accounts for 74 percent of the volume of Canadian fresh fruit and vegetable imports.

In 1982, 62 percent of all unloads, excluding bananas, were of imported produce. The dependence on imports is not limited to tropical and sub-tropical products. As the following table shows, the supply of most temperate climate products is also highly dependent on imports.

CANADA, 12 CITIES: IMPORT SHARE OF UNLOADS  
OF SELECTED COMMODITIES, 1982

Vegetables		:	Fruit	
Item	Percent	:	Item	Percent
Cabbage <u>1/</u> .....	33	:	Apples.....	38
Carrots.....	41	:	Blueberries.....	84
Celery.....	80	:	Cherries.....	80
Cucumbers.....	54	:	Table grapes <u>2/</u> .....	97
Lettuce.....	79	:	Peaches.....	57
Onions <u>3/</u> .....	38	:	Pears.....	61
Potatoes.....	19	:	Plums.....	75
Tomatoes.....	85	:	Strawberries.....	69
		:		

1/ Excludes Chinese cabbage. 2/ Excludes grapes for juice. 3/ Excludes green onions.

SOURCE: Agriculture Canada, Annual Unloads Report-Fresh Fruits and Vegetables, 1982.

## CANADA

The dependence on imports is, of course, heaviest during Canada's offseason. For instance, two-thirds of Canadian unloads of imported carrots occur during April-July, when domestic supplies are light. However, even during the height of Canada's harvest season, imports supply an important share of the market for many products. The following table and the graphs at the end of this article are illustrative:

CANADA, 12 CITIES: IMPORT SHARE OF UNLOADS OF SELECTED COMMODITIES DURING PRINCIPAL MARKETING SEASON, 1982

Item	Season	Share
<u>Vegetables</u>		
Beans.....	July-September	24
Cauliflower.....	July-October	15
Celery.....	August-October	21
Corn.....	August-September	16
Lettuce.....	July-August	29
<u>Fruit</u>		
Blueberries.....	August	68
Cherries.....	July	67
Peaches.....	August-September	20
Plums and Prunes.....	August-September	59
Strawberries.....	June-July	36

SOURCE: Agriculture Canada, Annual Unloads Report-Fresh Fruits and Vegetables, 1982.

Western Canada contains only 28 percent of Canada's population, and the western cities in the unloads report (Winnipeg and five cities west of Winnipeg) accounted for 33 percent of total recorded unloads in 1982. Nevertheless, Western Canada is a more important market for many U.S. exports, especially vegetables. Imports arriving disproportionately in western cities in 1982 included the following:

Product	Percent of Unloads in Western Cities
Potatoes.....	65
Onions.....	65
Cabbage.....	50
Carrots.....	49
Lettuce.....	43

## CANADA: IMPORTS OF FRESH VEGETABLES, 1982

Fresh Vegetables	Total Imports		Imports From U.S.	
	Quantity	Value 1/	Quantity	Value
	Metric Tons	C\$1,000	Metric Tons	C\$1,000
Artichokes.....	2,044	2,010	2,014	1,967
Asparagus.....	6,424	11,121	6,174	10,554
Beans, Green and Wax.....	9,153	8,172	8,613	7,669
Broccoli.....	35,835	21,422	35,801	21,406
Brussels Sprouts.....	3,993	3,008	3,611	2,624
Cabbage.....	34,192	13,471	33,722	13,227
Carrots.....	53,686	14,473	53,671	14,467
Cauliflower.....	20,230	16,154	20,217	16,144
Celery.....	80,153	30,379	80,146	30,375
Corn.....	18,783	6,621	18,782	6,621
Cucumbers.....	33,907	17,213	24,885	11,507
Lettuce.....	195,653	83,192	195,391	83,056
Mushrooms.....	1,536	3,212	1,531	3,202
Onions, Green.....	15,526	11,328	15,235	11,112
Onions, Other.....	49,107	14,366	43,410	12,213
Parsnips.....	1,255	457	1,255	457
Peas, Green.....	2,625	2,193	2,427	1,910
Peppers.....	37,002	26,572	31,178	22,036
Potatoes, Seed.....	6,011	1,019	6,011	1,019
Potatoes, Sweet.....	8,693	5,077	6,186	3,413
Potatoes, Other.....	120,651	31,331	120,651	31,331
Radishes.....	10,300	6,046	10,295	6,042
Rappini.....	957	751	957	751
Spinach.....	8,679	5,542	8,664	5,532
Tomatoes.....	122,558	84,346	108,105	74,473
Other Fresh Vegetables.....	51,499	33,403	44,929	28,135
Total Fresh Vegetables....	930,452	452,879	883,861	421,243

1/ In 1982, the average exchange rate was C\$1.00 per US\$0.81.

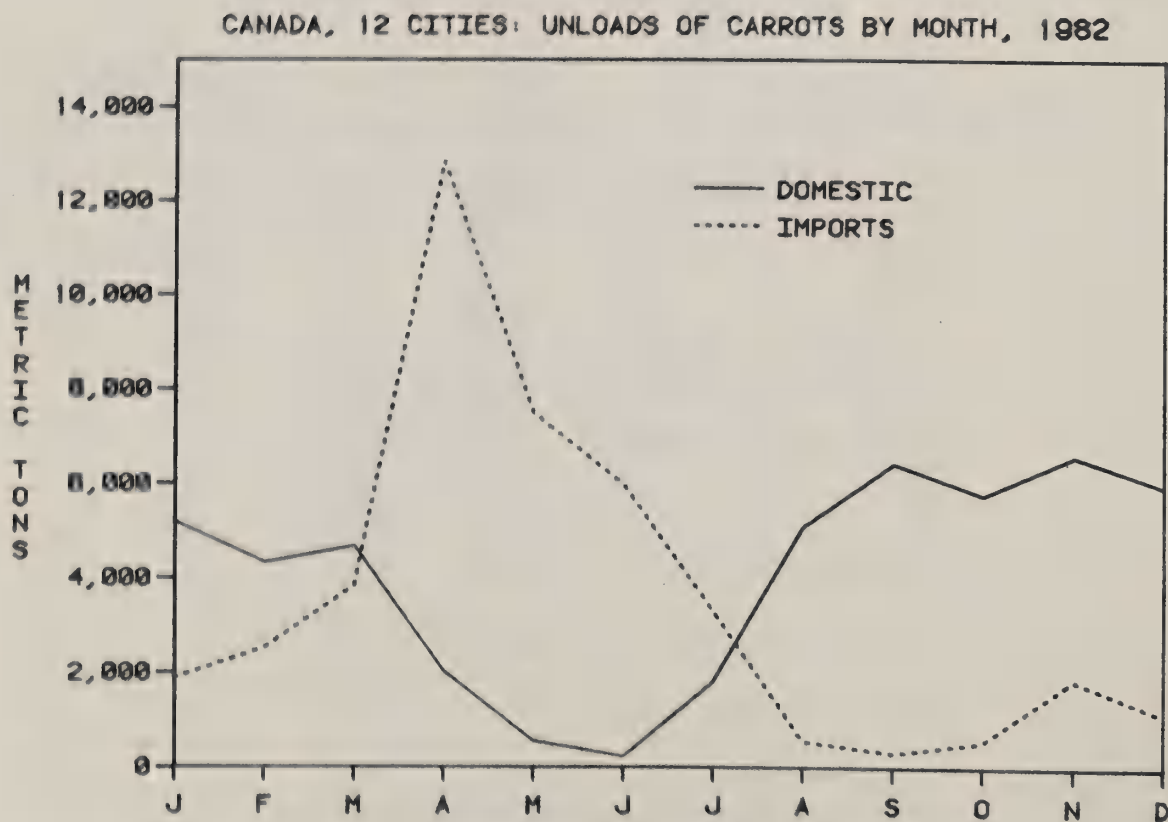
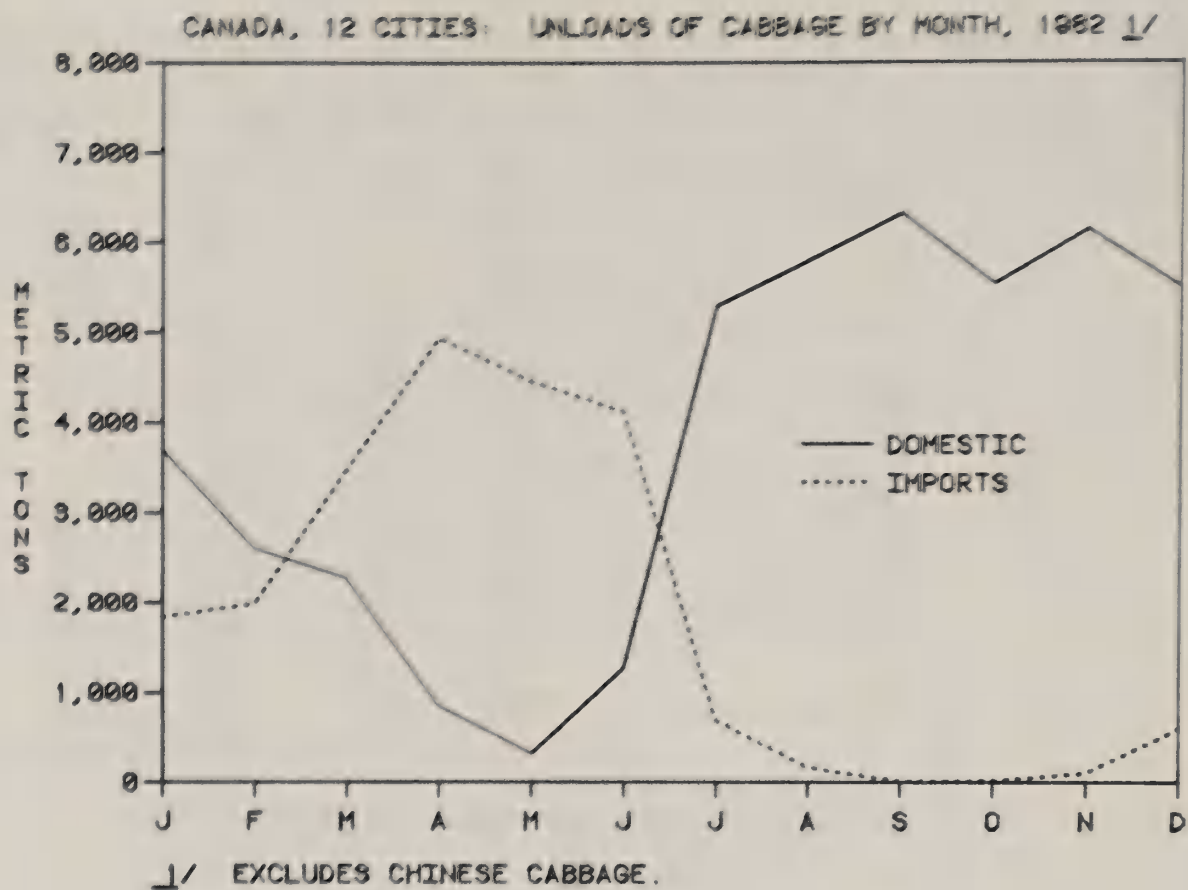
SOURCE: Official Trade of Canada.

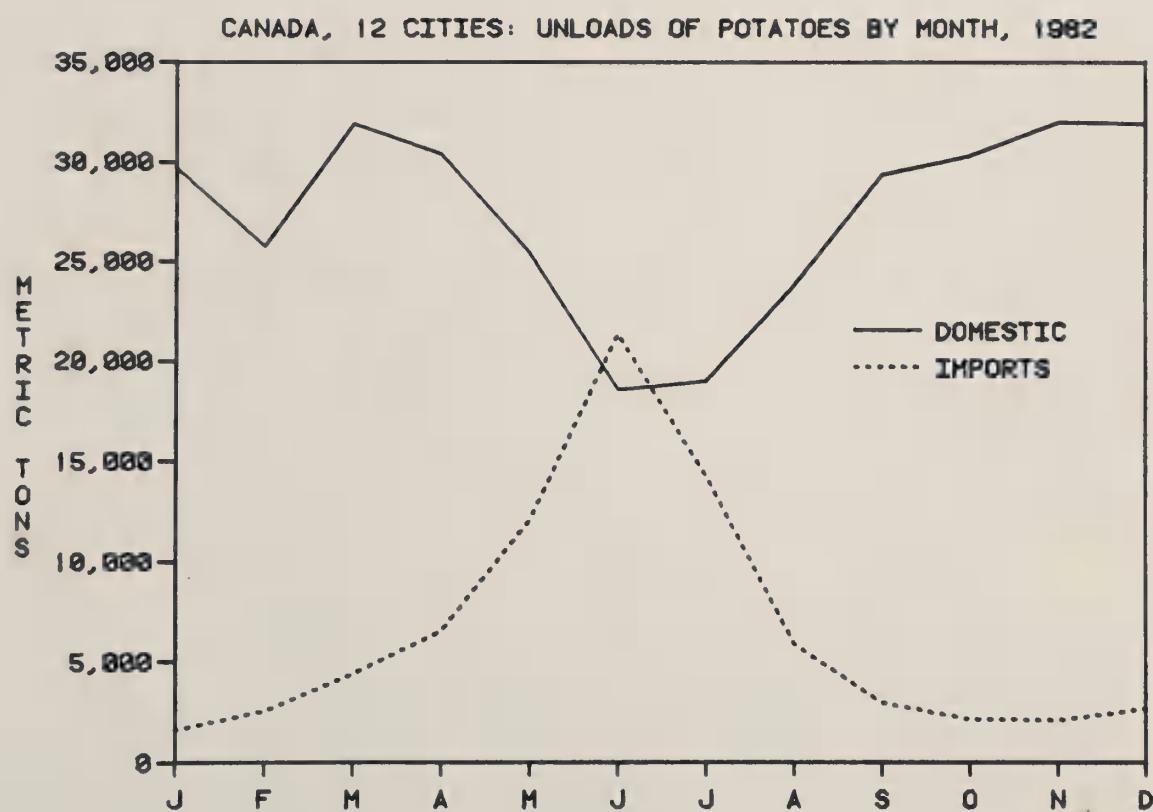
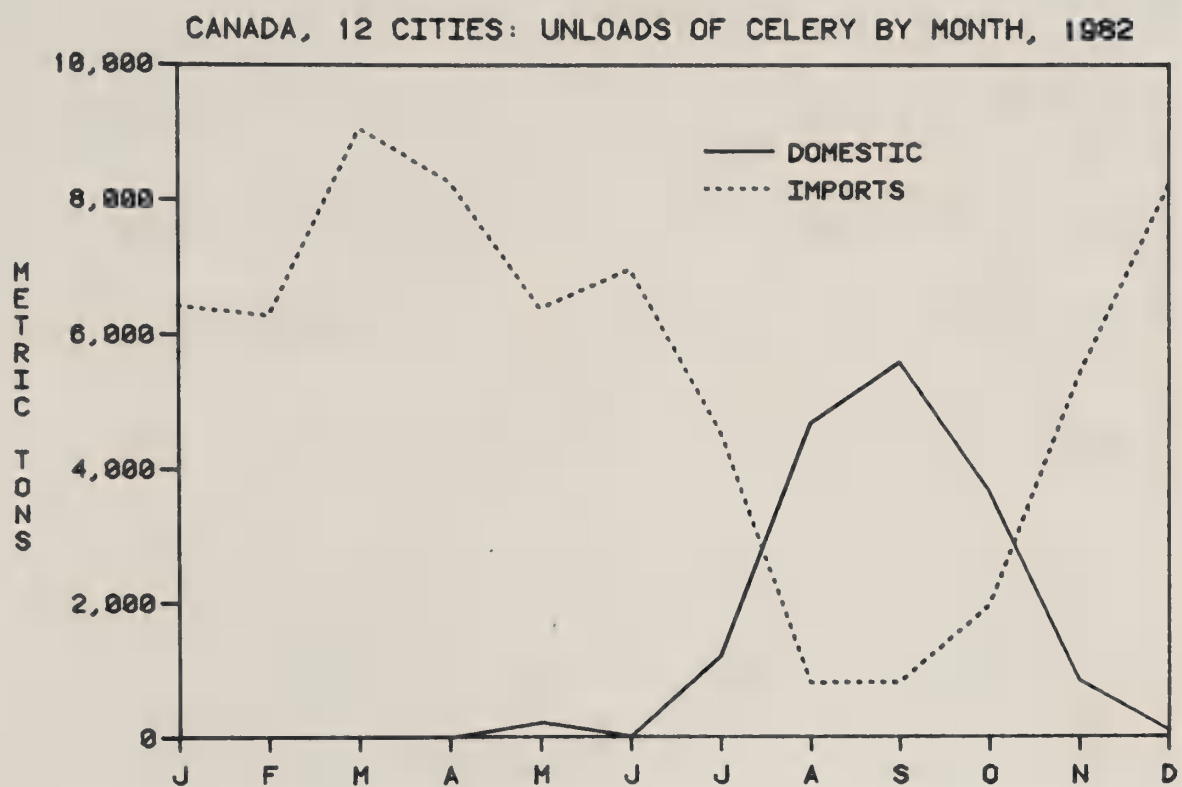
## CANADA: IMPORTS OF FRESH FRUIT, 1982

Fresh Fruit	Total Imports		Imports From U.S.	
	Quantity	Value 1/	Quantity	Value
	Metric Tons	C\$1,000	Metric Tons	C\$1,000
Apples and Crab Apples.....	107,678	68,467	87,118	52,398
Apricots.....	1,136	1,018	1,134	1,015
Berries, Other.....	398	340	348	254
Blueberries.....	4,472	7,079	4,472	7,078
Cantaloupes and Muskmelons.....	55,318	24,938	49,317	20,580
Cherries.....	6,692	12,643	6,635	12,524
Cranberries.....	4,520	5,706	4,520	5,706
Grapefruit.....	82,723	26,651	80,965	25,966
Grapes.....	145,220	140,588	126,732	108,571
Lemons.....	21,468	12,781	17,768	10,305
Melons, Other.....	72,338	16,433	66,628	14,856
Nectarines.....	21,228	19,055	20,149	17,355
Oranges, Mandarins, Tangerines..	275,078	141,302	216,836	103,802
Peaches.....	18,199	16,183	18,041	15,948
Pears.....	26,431	18,638	21,625	14,201
Pineapples.....	11,412	5,490	6,848	3,717
Plums.....	17,347	21,377	16,807	20,484
Strawberries.....	16,626	23,624	16,550	23,302
Other Fresh Fruit.....	22,532	26,590	18,322	20,334
Total.....	910,816	588,903	780,805	478,396
Bananas and Plantains.....	269,396	119,664	606	278
Total Fresh Fruit.....	1,180,212	708,567	781,411	478,674

1/ In 1982, the average exchange rate was C\$1.00=US\$0.81.

SOURCE: Official Trade of Canada.





SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	JUNE AND SEASON-JUNE 1963, WAREHOUSE				PERCENT
	1962	1963	SEASON- 1962	JUNE 1963	
APPLES, FRESH JULY 1					
CANADA.....	5,832	3,730	65,979	42,670	-36 -35
TOTAL EC-TEN.....	1,986	1,386	16,589	11,909	-30 -28
FRANCE.....	214	---	777	95	-100 -94
GERMANY, FED. REP.....	34	---	258	---	-100 -100
GREECE.....	---	---	28	---	-100 -100
IRELAND.....	---	88	1,112	1,627	+96 +37
NETHERLANDS.....	246	310	24,06	9,49	+26 -61
UNITED KINGDOM.....	1,492	989	12,008	9,387	-34 -22
OTHER EUROPE.....					
FINLAND.....	---	---	4,956	3,635	-29 -11
NORWAY.....	59	---	6,355	100	-11
SWEDEN.....	81	195	6,376	2,178	+29 -66
OTHER.....	114	199	1,730	1,339	-14 -23
TOTAL EUROPE.....	2,251	1,590	36,004	24,596	-29 -32
LATIN AMERICA.....	1,909	188	42,533	37,364	-90 -12
PERU AND CARIBBEAN.....	518	276	6,426	7,045	+7 +10
CHINA, TAIWAN.....	1,118	16	37,232	62,748	+99 +69
HONG KONG.....	794	---	10,328	57,185	-1 +41
OTHER COUNTRIES.....	897	2,640	66,224	71,688	+194 +4
WORLD TOTAL.....	13,320	9,928	273,727	273,598	-31 -11

PEARS, FRESH (JULY 1).....	422	1,282	23,638	15,695	+204	-34
CANADA.....	---	---	---	725	---	-75
TOTAL EC-TEN.....	---	---	---	100	---	-100
GERMANY, FED. REP.....	---	---	306	---	---	---
IRELAND.....	---	---	---	17	---	---
NETHERLANDS.....	---	---	329	137	---	-58
UNITED KINGDOM.....	---	---	88	18	---	-80
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	---	---	57	229	---	+303
NORWAY.....	---	---	1,300	885	---	-32
SWEDEN.....	---	---	4,537	2,968	---	-32
OTHER.....	3	2	25	7	-43	-71
TOTAL EUROPE.....	3	2	6,441	4,261	-43	-34
LATIN AMERICA.....	403	30	14,708	7,895	-93	-45
BERMUD AND CARIBBEAN.....	107	95	856	947	-11	+11
HONG KONG.....	---	---	315	95	---	-70
OTHER COUNTRIES.....	6	42	6,269	6,965	+67	+11
WORLD TOTAL.....	941	1,451	52,227	35,857	+54	-31
GRAPES, FRESH (JUNE 1).....	---	---	---	---	---	---
CANADA.....	3,388	3,804	3,388	3,804	+12	+12
TOTAL EC-TEN.....	---	---	---	21	---	---
UNITED KINGDOM.....	---	21	---	21	---	---
OTHER EUROPE.....	---	---	---	---	---	---
OTHER.....	---	1	---	1	---	---
TOTAL EUROPE.....	---	22	---	22	---	---
LATIN AMERICA.....	59	9	59	9	-84	-84
BERMUDA AND CARIBBEAN.....	46	26	46	26	-43	-43
HONG KONG.....	284	42	284	42	-85	-85
JAPAN.....	1	52	1	52	---	---
OTHER COUNTRIES.....	240	440	440	254	-42	-42
WORLD TOTAL.....	4,217	4,210	4,217	4,210	---	---

**ELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
1972 AND SEASON-JUNE 1983, WITH COMPARISONS**

COMMODITY/COUNTRY AND BEGINNING OF SEASON		1982		1983		SEASON- 1982		JUNE 1983		FROM 1982		CHANGE - JUN-1983- JUN	
		---(IN METRIC TONS)---										PERCENT	
ORANGES, FRESH (NOV 1)													
CANADA.....		9,315	14,688	115,718	128,630	58	-11						
TOTAL EC-TEN.....		1,162	6,411	4,003	23,860	+52	+89						
BELGIUM-LUX.....		426	723	1,095	3,186	70	+187						
DENMARK.....		---	---	---	---	51	---						
FRANCE.....		---	---	---	---	---	---						
GERMANY, FED. REP.....		137	626	626	3,105	---	+396						
IRELAND.....		---	78	137	---	---	---						
NETHERLANDS.....		---	---	---	---	51	---						
UNITED KINGDOM.....		736	5,430	2,075	13,395	+38	+546						
OTHER EUROPE.....		4,825	43	70	2,341	---	---						
FINLAND.....		---	---	---	---	---	---						
NORWAY.....		252	252	425	573	-1	---						
SWEDEN.....		147	413	681	1,966	---	---						
OTHER.....		86	---	143	25	-100	-83						
TOTAL EUROPE.....		1,648	7,076	5,252	26,282	+329	+800						
LATIN AMERICA.....		22	30	323	104	-32	-53						
BERMUDA AND CARIBBEAN.....		242	209	1,385	1,385	-14	-10						
HONG KONG.....		9,045	10,978	73,126	73,228	+21	-1						
JAPAN.....		21,064	19,358	65,048	65,128	-8	-3						
OTHER COUNTRIES.....		3,087	5,151	29,789	43,595	+67	+45						
WORLD TOTAL.....		44,825	57,431	250,541	335,008	+29	---						

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SELECTED AGRICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE 1983	CHANGE FROM 1982	PERCENT JUN:80S- JUN

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE 1983	CHANGE FROM 1982	PERCENT JUN:80S- JUN
ALMONDS, SHELLED (JULY 1)						
CANADA.....	73	308	2,675	3,322	+320	+24
TOTAL EC-TEN.....	2,634	2,559	3,591	27,937	-10	-24
BELGIUM-LUX.....	98	61	725	523	-38	-28
DENMARK.....	115	95	1,664	1,766	+18	+6
FRANCE.....	51	284	5,239	4,300	-453	-13
GERMANY, FED. REP.....	1,458	1,386	24,281	13,986	-5	-42
IRELAND.....	---	---	20	20	---	---
ITALY.....	39	16	465	153	-59	-26
NETHERLANDS.....	260	247	2,422	2,647	+5	+9
UNITED KINGDOM.....	613	271	4,775	4,543	-56	-5
OTHER EUROPE.....	39	20	439	490	+49	+12
FINLAND.....	97	32	2,009	1,946	-67	-6
NORWAY.....	95	164	2,880	3,669	+72	+27
SWEDEN.....	209	155	2,350	1,942	-26	-17
OTHER.....	3,076	2,731	47,569	35,896	-11	-24
TOTAL EUROPE.....	63	18	1,304	639	-71	-51
LATIN AMERICA.....	3	3	47	25	-31	-46
BERMUDA AND CARIBBEAN.....	---	---	67	59	-8	-12
HONG KONG.....	1,030	756	8,610	9,900	+27	+15
JAPAN.....	456	677	12,813	9,114	-48	-24
OTHER COUNTRIES.....	4,700	4,503	72,784	56,944	-4	-19
WORLD TOTAL.....	---	---	---	---	---	---
ALMONDS, UNSHELLED (JULY).....	---	---	---	---	---	---
CANADA.....	---	---	539	476	-63	-12
TOTAL EC-TEN.....	---	---	357	121	-236	-66
BELGIUM-LUX.....	---	---	30	---	---	---
DENMARK.....	---	---	10	---	---	---
FRANCE.....	---	---	77	---	---	---
GERMANY, FED. REP.....	---	---	141	---	---	---
IRELAND.....	---	---	19	---	---	---
ITALY.....	---	---	30	---	---	---
NETHERLANDS.....	---	---	50	---	---	---
UNITED KINGDOM.....	---	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	---	---	31	---	---	---
NORWAY.....	---	---	38	---	---	---
SWEDEN.....	---	---	44	---	---	---
OTHER.....	---	---	127	---	---	---
TOTAL EUROPE.....	---	---	6	---	---	---
LATIN AMERICA.....	---	---	2	---	---	---
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---
HONG KONG.....	---	---	---	---	---	---
JAPAN.....	---	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---	---
ALMONDS, PREP. OR PRES JULY 1:	---	---	---	---	---	---
CANADA.....	51	124	1,032	1,348	+143	+31
TOTAL EC-TEN.....	1,170	1,146	11,436	12,148	+2	+6
BELGIUM-LUX.....	6	74	175	205	+30	+17
DENMARK.....	1	---	22	14	-100	-37
FRANCE.....	66	310	2,323	2,750	+371	+18
GERMANY, FED. REP.....	664	401	5,513	5,730	+40	+4
GREECE.....	1	---	---	---	---	---
ITALY.....	---	---	17	---	---	---
NETHERLANDS.....	70	52	913	832	-25	-9
UNITED KINGDOM.....	363	309	2,471	2,616	+15	+6
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	---	---	121	107	-12	-12
NORWAY.....	42	11	262	132	-73	-50
SWEDEN.....	40	24	267	188	-40	-29
OTHER.....	52	77	927	1,144	+47	+23
TOTAL EUROPE.....	1,304	1,257	13,013	13,718	+4	+5
LATIN AMERICA.....	2	---	120	74	-74	-38
BERMUDA AND CARIBBEAN.....	1	---	11	19	+117	+78
HONG KONG.....	14	11	178	189	+41	+6
JAPAN.....	122	223	2,278	2,758	+82	+21
OTHER COUNTRIES.....	120	127	1,429	1,424	-6	-
WORLD TOTAL.....	1,615	1,746	18,070	19,530	+8	+8

SELECTED AGRICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE 1983	CHANGE FROM 1982	PERCENT JUN:80S- JUN

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE 1983	CHANGE FROM 1982	PERCENT JUN:80S- JUN
LEMONS, FRESH (AUG 1)						
CANADA.....	611	1,173	12,246	10,443	-92	-15
TOTAL EC-TEN.....	295	1,664	8,953	8,953	+66	+31
BELGIUM-LUX.....	58	94	1,230	1,230	+62	+60
DENMARK.....	---	78	88	269	+205	+205
FRANCE.....	69	724	3,456	5,191	+944	+50
GERMANY, FED. REP.....	---	---	2,729	206	-2,523	-92
IRELAND.....	---	---	---	---	---	---
ITALY.....	168	733	3,443	1,724	-337	-50
NETHERLANDS.....	---	35	214	333	+69	+55
UNITED KINGDOM.....	---	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	---	9	96	69	-28	-28
NORWAY.....	138	156	2,193	1,582	-113	-24
SWEDEN.....	---	---	22	9	-60	-60
OTHER.....	433	1,829	15,323	10,614	-322	-31
TOTAL EUROPE.....	29	30	410	44	-366	-90
LATIN AMERICA.....	10	67	73	183	+561	+50
BERMUDA AND CARIBBEAN.....	395	376	4,029	4,491	+5	+11
HONG KONG.....	10,884	12,796	98,427	103,870	+18	+6
JAPAN.....	22	35	1,299	3,321	+55	+156
OTHER COUNTRIES.....	12,384	16,305	131,807	132,968	+32	+1
WORLD TOTAL.....	---	---	---	---	---	---
PRUNES (AUG 1)						
CANADA.....	315	296	2,897	3,186	+6	+10
TOTAL EC-TEN.....	1,721	1,520	26,823	19,720	-12	-26
BELGIUM-LUX.....	98	24	1,101	663	-75	-40
DENMARK.....	174	77	2,397	1,093	-56	-54
FRANCE.....	71	179	4,940	1,588	-152	-65
GERMANY, FED. REP.....	445	359	5,837	3,784	-19	-36
GREECE.....	---	---	77	216	+182	+182
IRELAND.....	13	---	104	78	-100	-25
ITALY.....	519	140	8,262	6,963	-73	-16
NETHERLANDS.....	67	105	1,049	1,620	+58	+54
UNITED KINGDOM.....	334	636	3,006	3,715	+90	+24
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	81	24	2,735	2,174	-2	-20
NORWAY.....	214	80	1,689	1,539	-63	-9
SWEDEN.....	270	174	2,314	2,483	+35	+7
OTHER.....	2,379	2,63	26,444	3,096	-179	-17
TOTAL EUROPE.....	278	53	3,6204	2,9012	-11	-20
LATIN AMERICA.....	28	31	3,639	1,772	-81	-51
BERMUDA AND CARIBBEAN.....	20	51	535	382	-11	-29
HONG KONG.....	677	1,333	5,962	10,063	+97	+69
JAPAN.....	259	577	3,059	4,350	+123	+42
OTHER COUNTRIES.....	3,956	4,458	52,463	48,912	-13	-7
WORLD TOTAL.....	---	---	---	---	---	---
RAISINS (AUG 1)						
CANADA.....	542	580	7,202	6,290	-7	-13
TOTAL EC-TEN.....	392	49	9,777	8,866	-14	-5
BELGIUM-LUX.....	18	18	1,313	817	-328	-10
DENMARK.....	74	86	1,352	1,415	+17	+5
FRANCE.....	---	---	---	---	---	---
GERMANY, FED. REP.....	133	71	3,306	2,847	-53	-14
IRELAND.....	---	---	---	---	---	---
ITALY.....	37	81	1,360	1,270	-117	-7
NETHERLANDS.....	103	101	2,113	1,972	-1	-7
UNITED KINGDOM.....	---	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---	---
FINLAND.....	33	31	2,245	836	-6	-63
NORWAY.....	94	71	1,755	74	-20	-58
SWEDEN.....	154	201	3,547	2,802	-50	-21
OTHER.....	49	146	914	88	-195	-44
TOTAL EUROPE.....	723	897	18,238	14,129	-24	-23
LATIN AMERICA.....	150	73	2,303	2,437	+51	+6
BERMUDA AND CARIBBEAN.....	42	44	528	337	-5	-36
HONG KONG.....	17	103	661	628	-513	-5
JAPAN.....	363	1,104	13,986	15,846	+204	+13
OTHER COUNTRIES.....	659	340	8,481	9,296	+48	+10
WORLD TOTAL.....	2,496	3,140	51,399	48,962	-26	-5

AGRICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

JULY 1983

JULY 1983

AGRICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE	1983	CHANGE FROM 1982	PERCENT JUN-83-JUN-82
------(IN METRIC TONS)-----							
WALNUTS, NOT SHELLD (AUG 1)							
CANADA.....	42	84	1,338	2,037	+100	+52	
TOTAL EC-TEN.....	33	18	31,408	18,754	-46	-40	
BELGIUM-LUX.....	15	9	579	544	-36	-4	
DENMARK.....	---	---	---	---	---	---	
FRANCE.....	---	---	---	---	---	---	
GERMANY, FED. REP.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	18	11	4,932	4,508	-42	-9	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
NORWAY.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	158	10	12,554	9,230	-100	-26	
LATIN AMERICA.....	191	18	44,765	28,853	-91	-36	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
OTHER COUNTRIES.....	2	4	986	1,547	+100	+57	
WORLD TOTAL.....	44	4	2,149	1,417	+139	+34	
WALNUTS, SHELLD (AUG 1)							
CANADA.....	42	23	441	344	-45	-22	
TOTAL EC-TEN.....	30	15	1,240	631	-52	-49	
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
FRANCE.....	---	---	---	---	---	---	
GERMANY, FED. REP.....	10	---	135	108	-21	-21	
GREECE.....	---	---	---	---	---	---	
IRELAND.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	20	11	254	199	-47	-12	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	10	---	22	---	-100	-100	
NORWAY.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	51	15	733	514	-30	-30	
LATIN AMERICA.....	---	---	---	---	---	---	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
JAPAN.....	12	---	17	35	+104	+104	
OTHER COUNTRIES.....	34	51	422	402	+25	+5	
WORLD TOTAL.....	164	166	1,105	1,233	+104	+12	
TOMATOES, WHOLE (JULY 1)							
CANADA.....	651	487	10,299	6,304	-25	-39	
TOTAL EC-TEN.....	---	---	---	---	---	---	
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	---	---	---	---	---	---	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	---	---	---	---	---	---	
LATIN AMERICA.....	18	---	75	24	-68	-68	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
JAPAN.....	1	15	71	299	+22	+16	
OTHER COUNTRIES.....	56	3	93	93	-58	-58	
WORLD TOTAL.....	737	19	558	705	+66	+26	
TOMATO PASTE (JULY 1)							
CANADA.....	244	360	6,740	9,337	+47	+39	
TOTAL EC-TEN.....	---	---	---	---	---	---	
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	---	---	---	---	---	---	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	---	---	---	---	---	---	
LATIN AMERICA.....	10	---	72	33	-100	-54	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
JAPAN.....	11	19	389	652	+635	+68	
OTHER COUNTRIES.....	43	35	177	516	+61	+192	
WORLD TOTAL.....	333	445	8,515	11,583	+34	+36	

JULY 1983

HORTICULTURAL AND TROPICAL FRUITS DIVISION, FAS/USDA

U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	JUNE	1983	CHANGE FROM 1982	PERCENT JUN-83-JUN-82
------(IN METRIC TONS)-----							
APRICOTS, CANNED (JUNE 1)							
CANADA.....	---	---	---	---	---	---	
TOTAL EC-TEN.....	22	14	22	22	14	-37	-37
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
FRANCE.....	---	---	---	---	---	---	
GERMANY, FED. REP.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	---	---	---	---	---	---	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
NORWAY.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	---	---	---	---	---	---	
LATIN AMERICA.....	---	---	---	---	---	---	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
OTHER COUNTRIES.....	---	---	---	---	---	---	
WORLD TOTAL.....	149	29	149	149	29	-81	-81
MIXTURES >= FRUIT, PREP/PRES:							
CANADA.....	1,033	604	1,033	604	-42	-42	
TOTAL EC-TEN.....	257	308	257	308	+20	+20	
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
FRANCE.....	---	---	---	---	---	---	
GERMANY, FED. REP.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	---	---	---	---	---	---	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
NORWAY.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	---	---	---	---	---	---	
LATIN AMERICA.....	---	---	---	---	---	---	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
JAPAN.....	---	---	---	---	---	---	
OTHER COUNTRIES.....	---	---	---	---	---	---	
WORLD TOTAL.....	2,709	2,230	2,709	2,230	-18	-18	
PEACHES, CANNED (JUNE 1)							
CANADA.....	900	472	900	472	-48	-48	
TOTAL EC-TEN.....	352	706	352	706	+101	+101	
BELGIUM-LUX.....	---	---	---	---	---	---	
DENMARK.....	---	---	---	---	---	---	
FRANCE.....	---	---	---	---	---	---	
GERMANY, FED. REP.....	---	---	---	---	---	---	
ITALY.....	---	---	---	---	---	---	
NETHERLANDS.....	---	---	---	---	---	---	
UNITED KINGDOM.....	---	---	---	---	---	---	
OTHER EUROPE.....	---	---	---	---	---	---	
FINLAND.....	---	---	---	---	---	---	
NORWAY.....	---	---	---	---	---	---	
SWEDEN.....	---	---	---	---	---	---	
OTHER.....	---	---	---	---	---	---	
TOTAL EUROPE.....	---	---	---	---	---	---	
LATIN AMERICA.....	---	---	---	---	---	---	
BERMUDA AND CARIBBEAN.....	---	---	---	---	---	---	
HONG KONG.....	---	---	---	---	---	---	
JAPAN.....	---	---	---	---	---	---	
OTHER COUNTRIES.....	---	---	---	---	---	---	
WORLD TOTAL.....	2,350	2,996	2,350	2,996	+27	+27	

JULY 1983

HORTICULTURAL AND TROPICAL FRUITS DIVISIONS, FAS/USDA

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,  
TIME AND SEASON-JUNE 1983. WITH COMPARISONS

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS, JUNE AND SEASON-JUNE 1983, WITH COMPARISONS										JUNE AND SEASON-JUNE 1983, WITH COMPARISONS													
COMMODITY/COUNTRY AND BEGINNING OF SEASON		JUNE 1982		1983		SEASON- 1982		JUNE 1983		CHANGE FROM 1982		COMMODITY/COUNTRY AND BEGINNING OF SEASON		JUNE 1982		1983		SEASON- 1982		JUNE 1983		CHANGE FROM 1982	

SELECTED ~~ARTIFICIAL~~ PRODUCTS: QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1963, WITH COMPARISONS

FOREIGN BORN AND NATURALIZED CITIZENS OF THE UNITED STATES: 1990



# U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982		1983		SEASON- JUNE		CHANGE FROM 1982 JUN:BOJ- JUN
	JUNE	1982	JUNE	1983	1982	1983	

------(IN METRIC TONS)----- : PERCENT

HOPS EXTRACT (SEPT 1)	---	---	---	---	---	---	---
CANADA.....	40	17	103	***	499	---	---
TOTAL EC-TEN.....	39	440	386	-57	-12	---	---
BELGIUM-LUX.....	29	65	47	-100	-28	---	---
DENMARK.....	---	---	---	---	---	---	---
FRANCE.....	---	1	---	---	-62	---	---
GERMANY, FED. REP.....	---	10	4	---	-59	---	---
GREECE.....	---	85	121	-100	-42	---	---
IRELAND.....	---	1	---	---	-100	---	---
NETHERLANDS.....	---	137	53	---	-28	---	---
UNITED KINGDOM.....	17	149	149	---	---	---	---
OTHER EUROPE.....	9	66	12	-100	-82	---	---
SWEDEN.....	---	---	---	---	-100	---	---
OTHER.....	5	35	52	-60	48	---	---
TOTAL EUROPE.....	44	19	476	438	-58	---	---
LATIN AMERICA.....	25	58	1,101	1,135	-21	---	---
BERMUDA AND CARIBBEAN.....	---	---	---	---	-162	---	---
HONG KONG.....	---	14	38	---	---	---	---
JAPAN.....	---	1	2	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---	---	---
WORLD TOTAL.....	73	362	1,856	1,74	-89	-52	---

ONIONS, FRESH (OCT 1).....

CANADA.....	4,743	3,990	4,598	-16	-12
TOTAL EC-TEN.....	3	1,320	4,172	-100	-215
FRANCE.....	---	196	---	---	-100
GERMANY, FED. REP.....	3	114	38	-100	-66
GREECE.....	---	31	---	---	-100
IRELAND.....	---	---	20	---	---
NETHERLANDS.....	---	270	87	---	-68
UNITED KINGDOM.....	---	710	4,026	---	-467
OTHER EUROPE.....	---	---	---	---	-100
SWEDEN.....	114	---	---	---	-100
OTHER.....	---	---	---	---	-100
TOTAL EUROPE.....	117	---	---	---	-100
LATIN AMERICA.....	70	20	4,172	-100	-191
BERMUDA AND CARIBBEAN.....	489	486	1,902	-71	-74
HONG KONG.....	18	---	1,254	-1	-39
JAPAN.....	5	166	2,781	-100	-272
OTHER COUNTRIES.....	118	40	3,423	---	-96
WORLD TOTAL.....	5,560	4,702	13,530	---	-64

FRENCH FRIES, FROZ (OCT 1).....

CANADA.....	5	---	25	-100	-37
TOTAL EC-TEN.....	263	895	1	-100	-100
BELGIUM-LUX.....	---	3	---	---	-100
NETHERLANDS.....	---	32	1	---	-96
UNITED KINGDOM.....	263	860	---	-100	-100
OTHER EUROPE.....	---	---	---	---	-100
SWEDEN.....	---	14	118	---	-680
OTHER.....	1	15	---	-100	-100
TOTAL EUROPE.....	263	924	119	-100	-87
LATIN AMERICA.....	91	920	509	-100	-45
BERMUDA AND CARIBBEAN.....	204	264	1,566	30	12
HONG KONG.....	324	241	2,943	-26	39
JAPAN.....	3,935	24,496	26,197	-37	---
OTHER COUNTRIES.....	274	437	2,675	60	16
WORLD TOTAL.....	5,095	34,438	34,034	-33	41

POTATOES, FRESH (OCT 1)

CANADA.....	22,190	20,971	61,477	---	---
TOTAL EC-TEN.....	---	24	52,333	-5	-15
FRANCE.....	---	---	2	---	-92
GERMANY, FED. REP.....	---	---	1	---	---
GREECE.....	---	---	---	---	-100
UNITED KINGDOM.....	---	18	---	---	-100
OTHER EUROPE.....	---	---	---	---	-100
SWEDEN.....	---	185	238	---	28
OTHER.....	---	---	277	---	32
TOTAL EUROPE.....	887	209	2,77	---	32
LATIN AMERICA.....	462	543	1,061	-39	89
BERMUDA AND CARIBBEAN.....	---	314	2,593	-32	-80
HONG KONG.....	92	63	119	-84	89
OTHER COUNTRIES.....	---	32	486	-65	44
WORLD TOTAL.....	23,638	21,861	56,619	-8	-25

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,  
JUNE AND SEASON-JUNE 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982		1983		SEASON- JUNE		CHANGE FROM 1982 JUN:BOJ- JUN
	JUNE	1982	JUNE	1983	1982	1983	

------(IN METRIC TONS)----- : PERCENT

GARLIC DEHYDRATED (JAN 1)	32	41	384	---	---	---	---
CANADA.....	---	---	253	---	---	---	---
TOTAL EC-TEN.....	---	---	---	---	---	---	---
BELGIUM-LUX.....	---	---	---	---	---	---	---
DENMARK.....	---	---	---	---	---	---	---
FRANCE.....	---	6	2	---	---	---	---
GERMANY, FED. REP.....	4	8	56	---	---	---	---
IRELAND.....	1	1	3	-9	-138	---	---
NETHERLANDS.....	34	10	96	---	---	---	---
UNITED KINGDOM.....	18	24	88	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---	---	---
FINLAND.....	---	4	18	---	---	---	---
NORWAY.....	---	---	---	---	---	---	---
SWEDEN.....	6	1	21	-88	47	---	---
OTHER.....	5	4	47	---	---	---	---
TOTAL EUROPE.....	68	58	319	---	---	---	---
LATIN AMERICA.....	33	12	108	---	---	---	---
BERMUDA AND CARIBBEAN.....	84	12	195	---	---	---	---
JAPAN.....	17	8	40	---	---	---	---
OTHER COUNTRIES.....	20	33	138	---	---	---	---
WORLD TOTAL.....	254	154	1,385	---	---	---	---

ONIONS, DEHYDRATED (JAN 1).....

CANADA.....	189	91	1,178	---	---
TOTAL EC-TEN.....	381	485	2,469	---	---
FRANCE.....	13	---	---	---	---
GERMANY, FED. REP.....	21	22	---	---	---
GREECE.....	11	28	---	---	---
IRELAND.....	92	166	686	---	---
NETHERLANDS.....	6	---	---	---	---
UNITED KINGDOM.....	---	13	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	19	---	---	---
NORWAY.....	36	69	---	---	---
SWEDEN.....	205	168	1,296	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	11	30	48	---	---
LATIN AMERICA.....	38	---	---	---	---
BERMUDA AND CARIBBEAN.....	88	31	167	---	---
HONG KONG.....	61	87	293	---	---
JAPAN.....	580	633	4,746	---	---
OTHER COUNTRIES.....	21	39	94	---	---
WORLD TOTAL.....	1,013	1,160	6,103	---	---

WINES, FROM FRESH GRAPES JAN:

CANADA.....	504,386	278,428	2,613,374	1,831,681	-45	-30
TOTAL EC-TEN.....	185,099	144,497	857,905	713,124	-22	-17
BELGIUM-LUX.....	22,508	5,225	63,748	122,254	-77	92
DENMARK.....	8,751	10,037	75,664	14,261	-15	-81
FRANCE.....	152	1,147	14,217	15,691	655	10
GERMANY, FED. REP.....	21,493	2,668	107,965	52,013	-88	-52
IRELAND.....	29,862	642	35,680	6,627	-98	-81
NETHERLANDS.....	---	1,997	1,651	1,997	---	---
UNITED KINGDOM.....	2,549	12,020	25,574	22,613	-372	-12
OTHER EUROPE.....	99,784	110,761	533,406	477,678	-11	-10
FINLAND.....	---	---	---	---	---	---
NORWAY.....	153	---	4,443	624	-100	-100
SWEDEN.....	4,325	8,294	2,867	25,942	-92	-12
OTHER.....	14,586	16,274	94,293	53,474	-12	-43
TOTAL EUROPE.....	206,435	169,065	971,728	793,161	-18	-18
LATIN AMERICA.....	70,785	27,378	320,130	145,671	-61	-54
BERMUDA AND CARIBBEAN.....	65,245	58,139	418,473	409,071	-11	-2
HONG KONG.....	8,653	6,921	40,385	46,206	-20	14
JAPAN.....	15,784	19,696	154,699	150,882	-25	---
OTHER COUNTRIES.....	12,338	13,633	141,322	120,209	-10	-15
WORLD TOTAL.....	883,626	573,260	4,660,111	3,500,884	-35	-25

# Do you need information about

- Overseas markets and buying trends?
- New competitors and products?
- Trade policy developments?
- Overseas promotional activities?

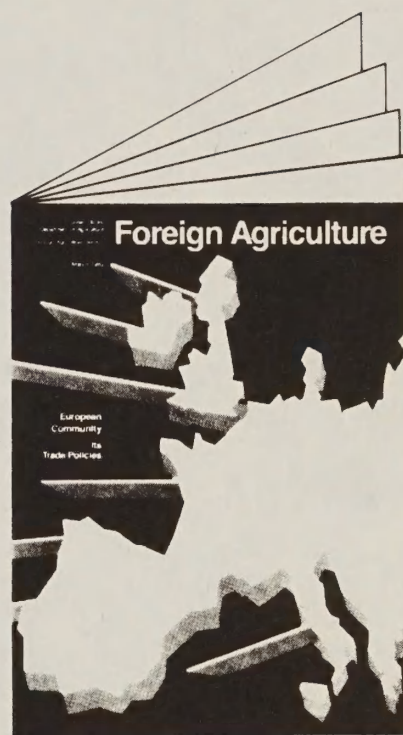
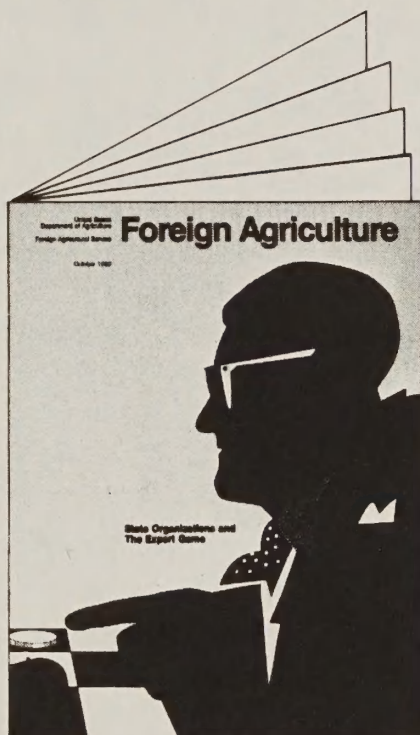
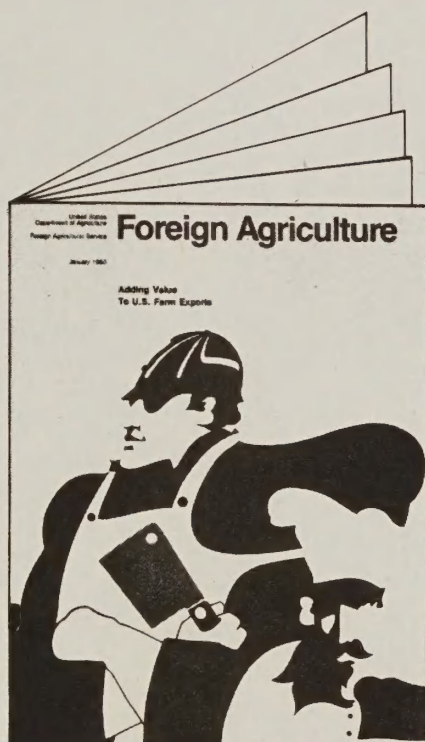
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